2018

MISSOURI ECONOMIC REPORT

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"Show Me" the Facts

ο Missouri's GDP totaled $263.1 billion in 2017 in inflation-adjusted dollars—a 1.1 percent increase over the previous year.

ο Between June 2017 to June 2018, Missouri added over 34,300 jobs, a 1.2 percent employment growth for Missouri.

ο Missouri's per capita personal income was $43,661 in the 2017, up 1.7 percent from 2016.

ο In June 2018, Missouri's unemployment rate was 3.5 percent, its lowest level since September 2000.

ο Missouri's labor force participation rate was 62.9, nearly matching the nations 62.8 percent in 2017. Nationally, as well as statewide, the number of older Americans (65+) staying in the labor force is increasing.

ο The *Health Care & Social Assistance* industry sector employed the most people in Missouri, with 461,800 employee in 2017. *Retail trade* was second (313,900) and *Manufacturing* was third (265,900).

ο The *Health Care & Social Services* industry added 11,800 jobs to the Missouri economy in 2017. *Professional and Technical Services* added 6,000 and *Accommodation and Food Services* added nearly 5,000. The *Administration and Support Services* sector lost around 2,400 jobs, and was the industry with the largest job decline.

ο *Health Care* and *Business & Management* related jobs are the most in-demand occupations based on a measure of on-line job advertisements.

ο The Kansas City Region had the highest employment growth rate in 2017 (1.6 percent) while the Ozark region grew at 1.5 percent.

Current Trends

Missouri's economy saw its sixth consecutive year of Annual Real GDP growth in 2017 with GDP growth continuing into Quarter 1 of 2018. Missouri GDP growth has lagged behind that of the U.S. over the past decade—in 2017, the U.S. Real GDP grew 2.1 percent. The Missouri economy added 34,300 jobs from June 2017 to June 2018 with *Health Care* and *Professional, Scientific & Technical Service* leading the job growth.

In June 2018, the Missouri unemployment rate dropped to 3.5 percent, it's lowest point since September 2000. The U.S. unemployment rate was 4.0 percent in June 2018. Labor Force participation grew from 2013 to 2015 but started to decrease in 2016 and by 2017 it reached 63.8 percent, its lowest point since 2007.

The sustained low unemployment rates, along with economic growth throughout 2017 and into 2018, represents a tight labor market for the state of Missouri. This means fewer people are looking for work as employers are looking to increase production to meet new economic demand. A tight labor market can result in increased wages as employers compete for workers, but it also means economic growth can be stunted as new demand within the economy is not met due to that lack of qualified employees to spur further production.

The Kansas City and the Ozark regions had the highest levels of employment growth in 2017, each growing over 1.5 percent. Regions with large metro areas, which tend to have economies that are more diverse, have been leading the way in employment growth in Missouri over the past five years. More rural regions, with economies concentrated more around manufacturing and agriculture, have had lower levels of employment growth over that time.

In this annual review of the Missouri economy, changes in gross state product, personal incomes, civilian labor force, unemployment, and employment are analyzed for the current period and more broadly over the last ten years. Moreover, in this review, special attention is paid to economic regions within Missouri—their diverse workforce and economies.

Missouri Economy Defined

Gross Domestic Product (GDP) is the broadest measure of economic activity. This measure tracks the market value of goods and services produced within a nation or state for a particular period of time. In 2017, Missouri's GDP was $263.1 billion (in 2009 constant dollars); this is a 1.1 percent increase over 2016. Nationally, GDP increased 2.1 percent over the same period.

Missouri Real Gross State Product Annual Growth Rate
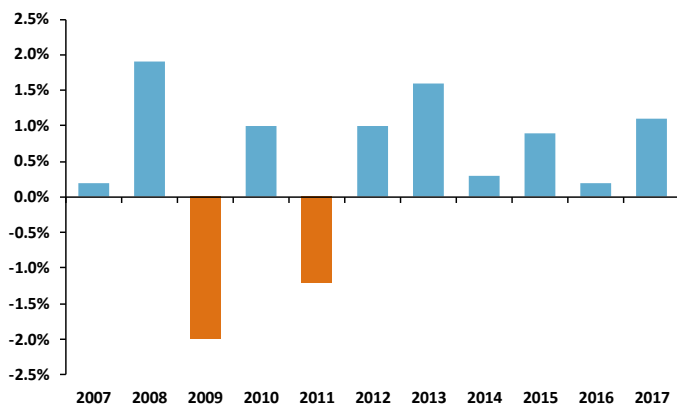
Source: U.S. Bureau of Economic Analysis, real GDP in chained dollars,

Missouri's annual growth rate maintained an upward trend. In 2014, Missouri experienced slower growth stemming from a sluggish first quarter, but in 2015 the state GDP climbed nearly 1 percent higher than the annualized growth rate of 2014. In 2016, that number dropped again, this time by 1.5 percent and then grew another 0.8 percent by 2017.

The state's GDP change, from 2016 to 2017, performed better than some surrounding states including: Kansas (-0.1 percent), Oklahoma and Iowa (0.5 percent), and Nebraska (0.6 percent). Arkansas had the same 1.1 percent growth rate as Missouri. Illinois had 1.2 percent, Kentucky at 1.8 percent, and Tennessee had the highest growth rate of the neighboring states at 2.5 percent.

Most industry sectors show GDP growth from 2007 to 2017. Downturns can be seen in the *Construction* and *Natural Resources & Mining* sectors. The *Information* sector shows a downward trend with a slight increase in 2016. From 2013 to 2017, Missouri industries produced a total $6.3 billion in goods and services (12.5 billion from 2007 to 2017)—growing at an annualized 0.5 percent per year or 5 percent GDP increase overall.

Per Capita Personal Income is a rough indicator of the economic well-being of an area's residents. Per capita income is calculated by dividing an area's total personal income by its population. The average annual income of a Missouri citizen in 2017 was $43,661 and nationally it was $50,392. While the state's per capita income is lower than the national average, so is the cost of living. In 2017, Missouri ranked 6th lowest in cost of living for states.

The pace of income growth at the national level has generally been faster than Missouri's, though the state mirrors the nation in positive growth. From 2007 to 2017, annual growth rates show that the U.S. total personal

Personal Income Annual Growth Rate
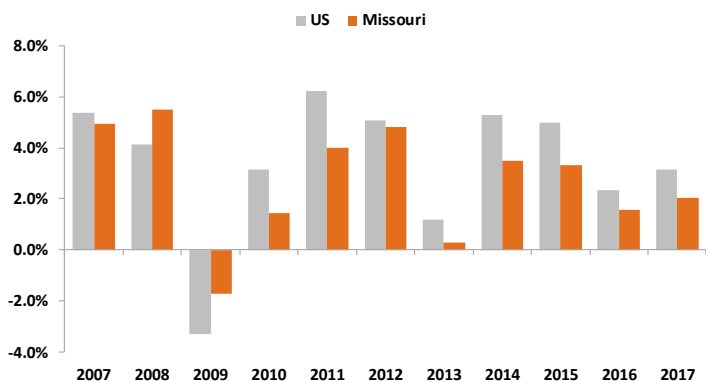
Source: U.S. Bureau of Economic Analysis,

incomes increased an average 2.4 percent and Missouri total personal incomes increased an average 2.1 percent. Among surrounding states, Arkansas and Nebraska increased by 2.8 percent, Tennessee by 2.6 percent, Kansas, Iowa, and Illinois by 2.3 percent, Kentucky by 2.2 percent and Oklahoma by 2.1 percent.

Total personal income includes the wages and salaries of workers and other income received such as dividends, interest, rent, and transfer payments.

In 2017, twenty percent of total personal income was transfer payments. Transfer payments are monies paid out by the government to individuals through Social Security, Disability Insurance, Medicare, Unemployment Insurance compensation, Veterans benefits, Education and Training Assistance programs (Pell Grants for example), and low-income assistance benefits (which include SSI, Medicaid, CHIP, and TANF).

Missouri Components of Personal Income
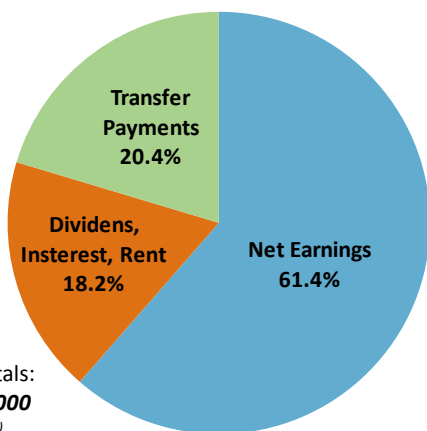
Component Totals:
**$266,920,797,000**
(in 2009 constant $)

Source: U.S. Bureau of Economic Analysis, 2016

The Federal government made over $2.8 trillion in transfer payments in 2017 with Missouri residents receiving about $54.3 billion in payments. Over the last ten years, the transfer payments share of total personal income has grown by 3 percentage points; nationally, from 14.4 percent in 2007 to 17.4 percent in 2017; and

statewide, from 16.8 percent to 20.4 percent. Social Security and Medicare made up the largest share of transfer payments.

Civilian Labor Force is defined as the number of non-institutionalized persons—16 years and older—who are either gainfully employed or are unemployed but actively seeking work, which totals 2.9 million in Missouri for 2017. According to data from the Bureau of Labor Statistics, in 2017 the 35 to 54 age cohort comprised 25 percent of Missouri's population and 42 percent of its civilian labor force. The 65+ age cohort made up 17 percent of the population and 6 percent of the civilian labor force. In 2007, the 65+ age cohort comprised nearly 4.5 percent of the civilian labor force; in 2017 they represented 6.4 percent.

Missouri Population and Labor Force By Age Cohort
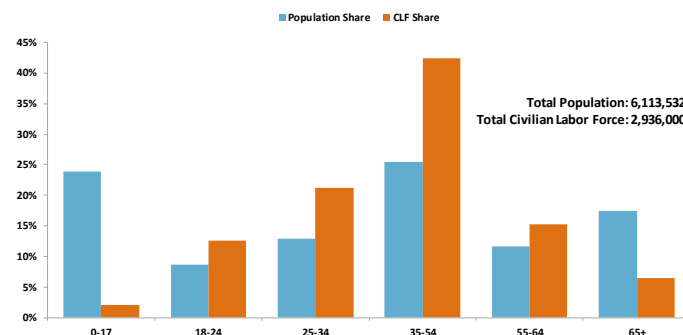
Source: U.S. Census Bureau, Current Population Survey; U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics, 2017

Income growth, and by extension growth in the economy, is affected by labor force participation. The labor force participation rate (LFPR) is the ratio of the civilian labor force to the population. The national LFPR climbed to a peak of 67 percent by 1990 where it seemed to stabilize. However, since 2001 the LFPR has been falling.

In the last ten years, the Missouri LFPR has averaged about 64 percent. More Missourians—as a share of the state's working age population—participate in the labor force. In 2017, Missouri was 1.0 percentage point higher

than the US total of 62.8 percent. There was an overall downward trend from 2007 to 2017 for both Missouri and the nation. Compared to 2007, the U.S. LFPR decreased by 3.2 percent and Missouri decreased by 3.1 percent.

In 2017, four of Missouri's neighboring states scored higher: Nebraska (68.7), Iowa (68.4), Kansas (66.6), and Illinois (64.5). Arkansas, Kentucky, Tennessee, and Oklahoma each scored lower than 63.8 percent.

Missouri has consistently outperformed the nation in civilian labor force participation rates. Starting in 2013 the participation rates for Missouri began to diverge from the nation's rates, outperforming the U.S. by 1.1 percentage points in 2013, 1.8 percentage points in 2014,

Civilian Labor Force Participation Rates
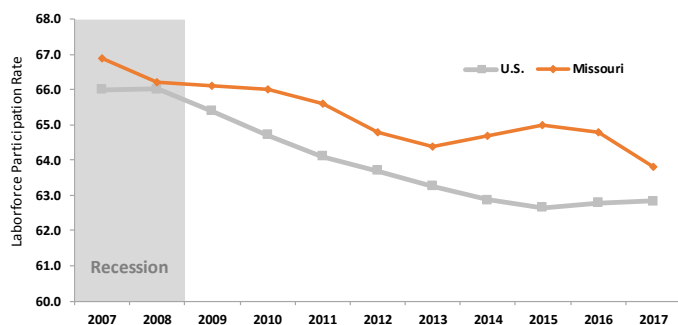
Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics

2.3 percentage points in 2015, then by 2016 the rates started converging again.

Unemployment Rate measures the number of persons out of work but actively seeking employment. As of June 2018, the nation's unemployment rate was 4.0 percent. Missouri's unemployment rate was 3.5 percent, representing 106,306 Missourians out of work. June 2018 makes 16 consecutive months of unemployment rates below 4 percent.

This continued low unemployment, both within the U.S.

and Missouri, results in a tight labor market—which means fewer people are looking for jobs while the economy needs more employees to meet growing demand. The result can be good for workers, as there is upward pressure on wages as employers compete for their service. The downside to the tight labor market is that it limits the growth that is possible within the

Unemployment Rate
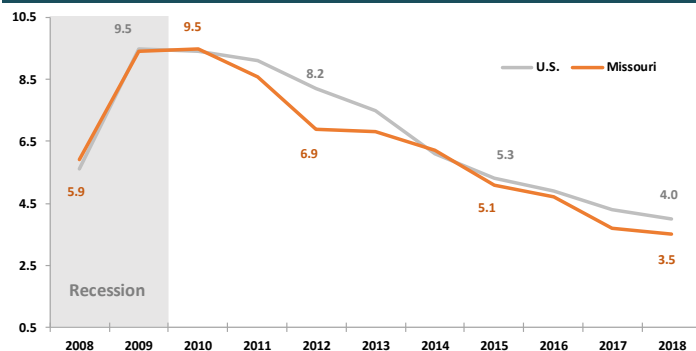
Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics.

economy, as producers are not able to find the employees they need to expand production and increase productivity.

Nonfarm Payroll Employment increased 1.6 percent nationally, between June 2016 and June 2017, and maintained a 1.6 percent growth from June 2017 to June 2018. Statewide, Missouri increased by 1.2 percent adding 34,300 jobs from June 2017 to June 2018.

Payroll Employment Annual Growth Rate
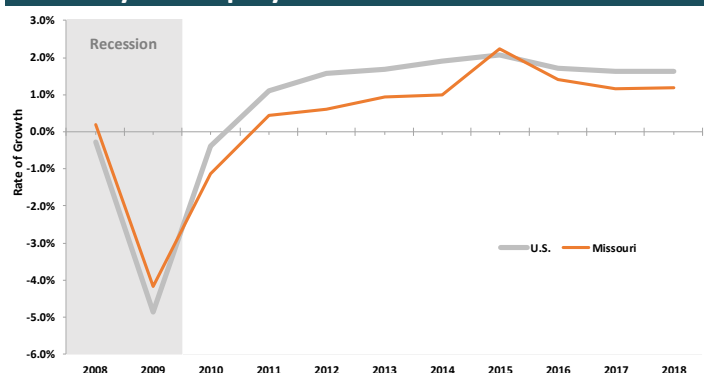
Note: Year-over-Year, annual data
Source: U.S. Bureau of Labor Statistics, CES

From June 2011 through June 2018, the nation added nearly 17 million jobs to the economy. The number of jobs added to the economy increased an average of 1.7 percent annually.

Missouri has followed the national pattern, although at a slower rate than the nation. Since 2011, Missouri has added over 236,700 jobs to the state's economy, an increase of 1.2 percent average annual growth.

Employment change by industry identifies the types of jobs being created in the state. Industries with increasing employment indicate a greater need within that sector for Missouri. There are also industries that behave more cyclically, growing during economic expansion and decreasing in times of economic slowdown or contraction.

These changes are crucial; they help identify both the types of occupational job-loss that is occurring and industries that are expanding or hiring.

Excluding *Public Administration* and *Other Services,* thirteen out of eighteen 2-digit NAICS industries added jobs between 2016 and 2017 on a seasonally adjusted basis. The largest increases for Missouri industries were in *Healthcare* which gained 11,832 workers; *Professional Services* which added 6,036; *Accommodation and Food Services* which added 4,959, and *Finance* which added 3,460.

The largest industry losses were in the *Administrative and Support Services* sector, which lost 2,405 jobs, followed by *Retail* with 2,050 jobs, and *Information* at 1,179 jobs lost. With most of the sectors showing employment increases, it bodes well for Missouri's continued economic growth.

Missouri Employment Change by Industry Sector 2016 to 2017
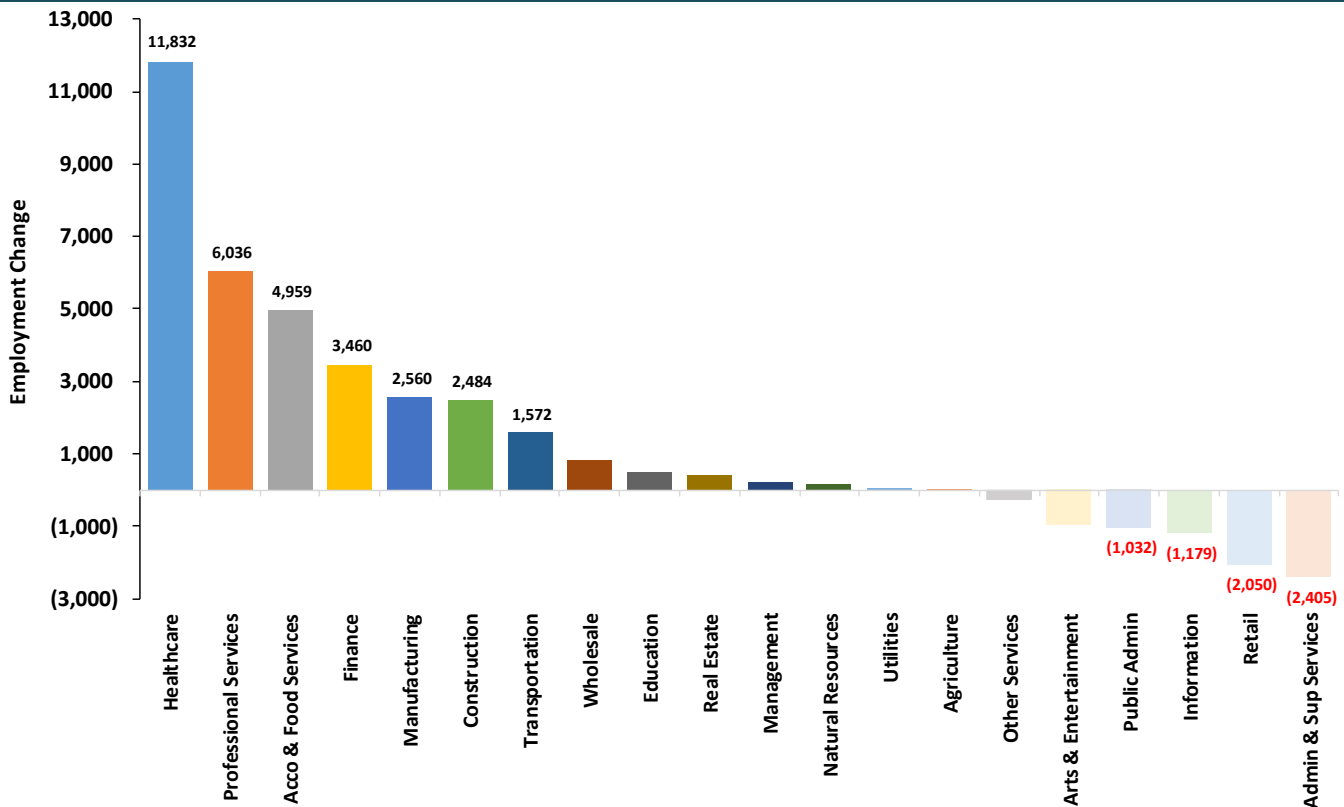
Source: MERIC analysis of the Quarterly Census of Employment and Wages micro-data, 2016 to 2017

Regional Analysis

Missouri's economy is diverse and varies by geography, natural resources and population. To better understand the state's economy, the following section analyses the various regional economies. The state is divided into ten regions, as shown in the map below. These regions were developed using the Workforce Development Areas created by the Workforce Investment Act of 1998 and continued with the Workforce Innovation and Opportunity Act of 2014. For a list of the economic regions used in this analysis and the counties that make up those regions, see *Appendix A*.

Bubble size represents number of employees

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

The Missouri Regional Economic Profiles graph provides information on the total employment (size of the bubble) employment growth (horizontal axis) and average annual wage (vertical axis) for each region. Missouri's largest employing regions have higher levels of employment growth and higher wages. This is a trend occurring throughout the United States.

Kansas City is the fastest growing region in Missouri with a growth rate of 1.9 percent per year from 2012 to 2017. The Ozark region has the second highest employment growth rates, averaging 1.7 percent employment growth per year. St. Louis had employment growth rates higher than the state average in four of the past five years.

The Central Region averaged 1.0 percent employment growth from 2012-2017, slightly below that of the state average employment growth.

The Northeast, Northwest and West Central regions had slow employment growth over the past three years. Each region grew over 1.0 percent in 2014 to 2015, but from 2016 to 2017, those three regions grew -0.2 percent, -0.1 percent, and .02 percent respectively.

The Southwest region had stable growth over the past three years, growing at 0.5 percent to 0.6 percent per year. The Southeast and South Central regions had the lowest levels of employment growth over the past five years, with each region experiencing declining employment in two of the past three years.

Central Region

The Central Region is comprised of 19 counties in the center of Missouri. This region is home to several cities including Columbia, Mexico, Rolla, Camdenton, Lebanon and the state capitol, Jefferson City.

Many of Missouri's major highways cross through this region. Interstate 44 runs through the southern part of the region, while Interstate 70 crosses the northern part. In addition, Highway 50, Highway 54 and Highway 63 cross through the region.

WORKFORCE DEMOGRAPHICS

The Central Region workforce has over 278,000 employees, making up 10 percent of Missouri employment. In this report, workforce is defined as a the average regional monthly employment according to the 2017 Quarterly Census of Employment and Wages.

The workforce is getting older in the Central Region, a trend happening throughout Missouri and the U.S. In 2017, 22 percent of the workforce was age 55 or older, up from 17 percent a decade earlier.

In 2017, 51 percent of the workforce was female and 49 percent was male, which matches the Missouri average. For the region, 11 percent of the workforce was non-white, compared to 17 for the state; 3 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.
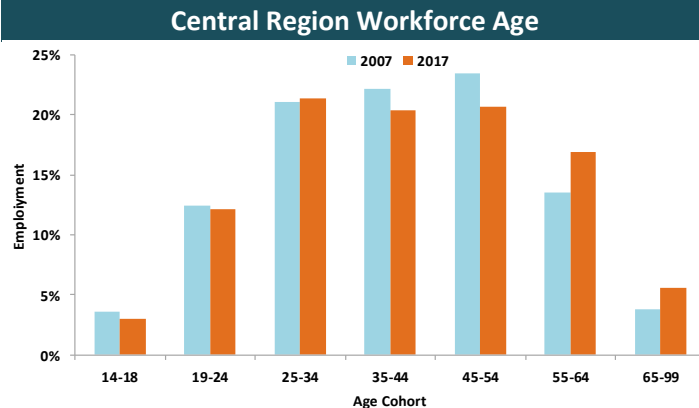
For 6 percent of the region's population ages 18 to 64 the primary language spoken at home is something other than English, matching Missouri. The U.S. population has a primary language of something other than English in 22 percent of homes. The Central Region has a higher percentage of the population with a disability compared to the state and nation. For the Central Region, 14 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

Source: US Census Bureau, LEHD, Annual Average 2016Q4 -2017Q3

Educational attainment rates for the Central Region are slightly behind those of the state in regards to bachelor's or advanced degrees. Thirty-four percent of the region's population, age 25 and older, has an associates, bachelor's or advanced degree compared to 35 percent for the state.

Educational Attainment
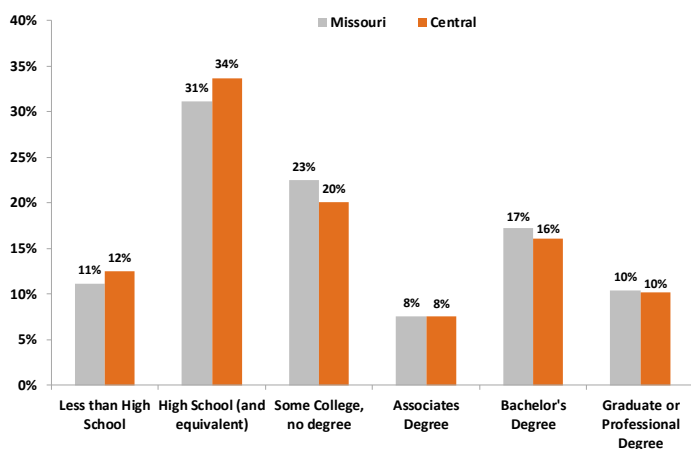
Source: US Census Bureau, ACS, 2012-2016 5-Year Estimates

INDUSTRY ANALYSIS

The Central Region averaged 280,545 employees per month in 2017. The region added 2,500 jobs in 2017, growing 0.9 percent. Missouri employment also increased 0.9 percent in that time. From 2012 to 2017, the Central Region averaged 1.0 percent employment growth, compared to 1.3 percent for Missouri.

Employment Annual Growth Rate
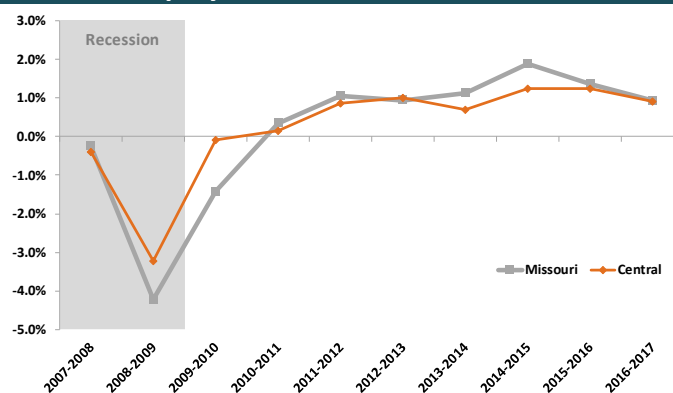
Source: MERIC, QCEW, 2017 Annual Average

With the University of Missouri, as well as other colleges and universities, and the state capital within the region, much of the regional employment is built around these institutions. The *Health Care and Social Assistance* industry sector continues to be the largest employer in the region, showing consistent, steady growth over the past five years. *Educational Services* had little change in employment and *Public Administration* employment has lost over 1,200 jobs from 2012 to 2017.

The region is also home to industry sectors focused on the export of goods and services. *Manufacturing* added over 2,600 jobs from 2012 to 2017. In 2017, *Manufacturing* employment grew 4 percent in the region,

Table 1: Central Region Top Industries by Employment

Industry	2012 Employment	2017 Employment	Net Change	2012-2017 Employment CAGR	2017 Average Annual Wages
Health Care and Social Assistance	41,839	46,578	4,739	2.2%	$41,362
Retail Trade	35,238	36,117	879	0.5%	$25,445
Educational Services	30,962	30,911	(51)	0.0%	$46,770
Accommodation and Food Services	25,738	28,754	3,016	2.2%	$15,854
Public administration	29,896	28,610	(1,286)	-0.9%	$43,418
Manufacturing	23,185	25,804	2,620	2.2%	$44,761
Construction	11,463	12,700	1,237	2.1%	$44,805
Finance and Insurance	9,255	10,369	1,114	2.3%	$61,333
Admin and Support and Waste Management	8,220	9,864	1,644	3.7%	$29,186
Transportation and Warehousing	7,719	8,453	734	1.8%	$40,187

Source: MERIC, QCEW, 2017 Annual Average

adding 1,000 new jobs. *Transportation Equipment Manufacturing* (10 percent growth) and *Computer and Electronic Product Manufacturing* (17 percent growth) led the way within the industry sector.

The *Finance and Insurance* industry sector showed substantial growth in 2017— adding over 500 employees in a handful of companies. This followed four years of relatively little change in employment within *Finance and Insurance*. This employment growth can be attributed to employment within *Credit Intermediation & Related Activities*.

Retail Trade lost over 700 jobs in 2017—with *Building Material & Garden Equipment Dealers* and *Clothing Retailers* seeing the highest employment decline within the industry sector. *Professional, Scientific & Technical Services* also had declining employment within the Central Region—showing a 2.3 percent drop in employment from 2016 to 2017. *Professional, Scientific & Technical Services* had declining employment in three of the past four years.

Location Quotient

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average.

The Central Region has high concentrations in advanced manufacturing, including the manufacturing of *Electrical Equipment*, *Wood Products, Plastic & Rubber Products,* and *Motor Vehicle Parts.* Other concentrated industries include *Printing & Related Support Activities* and *Non-store Retailers*.

Table 2: Central Region Location Quotients		
Industry	**Employment**	**Location Quotient**
Electrical Equip. , Appliance, & Component Mfg.	2,551	4.0
Printing & Related Support Activities	2,008	2.8
Wood Product Mfg.	1,796	2.7
Nonstore Retailers	2,399	2.5
Gasoline Stations	3,755	2.4
Utilities	1,873	2.0
Plastics & Rubber Products Mfg.	1,887	1.6
Building Material & Garden Equip. Dealers	3,304	1.5
Motor Vehicle & Parts Dealers	5,093	1.5
Credit Intermediation & Related Activities	6,674	1.5
Nonmetallic Mineral Product Mfg.	1,033	1.5
Nursing & Residential Care Facilities	8,384	1.5
General Merchandise Stores	7,793	1.5
Machinery Mfg.	2,673	1.5

Source: MERIC, QCEW, 2017 Annual Average

LABOR MARKET ANALYSIS

Unemployment

The regional unemployment rate was 3.3 percent in June 2018, slightly down from 3.6 percent in June 2017. This mirrors state and national trends, representing a tight labor market—which means there are less workers looking for employment and employers are having to compete more for the labor that is available. It also means that some employers may have a hard time finding qualified employees for some positions. From June 2013 to June 2018, the unemployment rate dropped 3.6 percentage points.

Occupational Projections

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its **Now-Next-Later** categorization system to help job seekers understand the training, education, and experience requirements for various occupations.

Now jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

Next jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates degree or some postsecondary education.

Later jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For **Now** occupations, *Food Service Workers, Cashiers,* and *Retail Salespersons* lead the way in total openings. Health care related positions, including *Home Health Aides*, *Veterinary Assistants,* and *Personal Care Aids* are projected to be the fastest growing **Now** occupations over the next decade.

Nursing Assistants and food service related occupations such as *Cooks* and *First-line Supervisors of Food Prep and Serving Workers* will have the most openings for the **Next** category of occupations. *Medical Assistants* and *Paralegals* are the fastest growing **Next** occupations.

For **Later** occupations, *Registered Nurses*, *General & Operations Managers*, and *K12 Teachers* will have the most openings. *Interpreters*, *Statisticians,* and *Software Developers* are the fastest growing **Later** occupations.

Table 3: Central Region Long-Term Occupational Projections						
Occupation	**2016 Estimated Employment**	**2026 Projected Employment**	**Growth Openings**	**Replacement Openings**	**Total Openings**	**Median Wages**
NOW						
Food Prep. & Serving Workers	7,516	9,804	2,288	15,688	**17,976**	$19,023 🔥
Cashiers	7,866	8,477	611	15,160	**15,771**	$18,768 🔥
Retail Salespersons	9,499	9,776	277	13,750	**14,027**	$22,496 🔥
Waiters and Waitresses	4,870	5,803	933	10,002	**10,935**	$18,623
Secretaries and Administrative Assistants	8,878	8,692	-186	9,335	**9,149**	$30,123 🔥
NEXT						
Nursing Assistants	4,329	4,742	413	5,047	**5,460**	$23,193 🔥
Cooks, Restaurant	2,517	3,122	605	3,908	**4,513**	$22,080 🔥
Food Prep. & Serving Workers Supervisors	2,459	2,996	537	3,824	**4,361**	$25,917
Retail Sales Supervisor	3,545	3,846	301	3,851	**4,152**	$35,102 🔥
Bookkeeping & Accounting Clerks	2,985	3,071	86	3,330	**3,416**	$31,714 🔥
LATER						
Registered Nurses	6,755	7,671	916	3,633	**4,549**	$60,523 🔥
General and Operations Managers	4,277	4,926	649	3,699	**4,348**	$70,632 🔥
Secondary School Teachers	4,573	4,970	397	3,242	**3,639**	$42,569
Accountants and Auditors	2,085	2,376	291	1,941	**2,232**	$50,564
Business Operations Specialists	2,048	2,232	184	1,906	**2,090**	$53,942

🔥 *denotes occupations within the top ten for on-line job ads in 2017 in the region within the respective Now-Next-Later classification.*

Source: MERIC Occupational Projections, 2016-2026

Table 4: Central Region Fastest Growing Occupations
NOW
Home Health Aides
Helpers--Production Workers
Veterinary Assistants
Personal Care Aides
Food Prep. & Serving Workers
NEXT
Medical Assistants
Paralegals and Legal Assistants
Cooks, Restaurant
Respiratory Therapists
Web Developers
LATER
Nurse Practitioners
Software Developers, Applications
Veterinarians
Market Research Analysts and Marketing Specialists
Personal Financial Advisors

Note: Occupations with net increase of less than 50 are omitted.

Source: MERIC Occupational Projections, 2016-2026

Kansas City Region

The Kansas City Region is comprised of five counties in the West Central part of Missouri. The region is home to several major cities including Kansas City and Independence.

Many of Missouri's major highways cross through this region. Interstate 70 runs through the center of the region, while Interstate 29 and Interstate 35 and 435 cross through the region. In addition, Highway 24, Highway 40, Highway 50, Highway 69, Highway 71 and Highway 169 cross through the Region.

WORKFORCE DEMOGRAPHICS

The region is home to over 548,400 employees who make up 20 percent of Missouri's workforce. In this report, workforce is defined as a the average regional monthly employment according to the 2017 Quarterly Census of Employment and Wages.

The workforce in the Kansas City Region is getting older, a trend happening throughout Missouri and the U.S. In 2017, 22 percent of the workforce age was 55 and older, up from 17 percent in 2007.
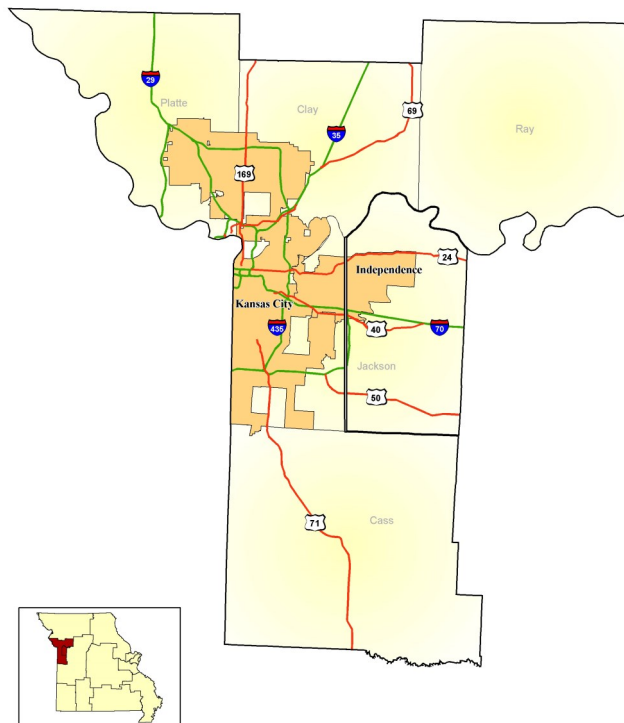
In 2017, 50 percent of the workforce was female and 50 percent was male, which compared to a 51/49 split for Missouri. For the region, 20 percent of the workforce was non-white, compared to 17 percent for the state; 6 percent was Hispanic or Latino, compared to 4 percent for Missouri.
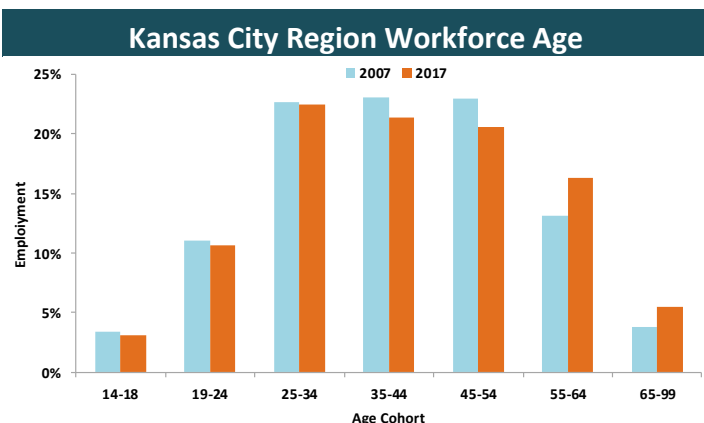
For 8 percent of the regions population ages 18 to 64, the primary language spoken at home is something other than English, compared to 6 percent for Missouri and 22 percent for the U.S. The Kansas City Region has a lower percentage of the population with a disability compared to the state. For the region, 12 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

Kansas City Region Workforce Age

Source: US Census Bureau, LEHD, Annual Average 2016Q4 -2017Q3

Educational attainment rates for the Kansas City Region is higher than that of Missouri in regards to post-secondary education. In the region, 38 percent of the population 25 and older has an associates, bachelor's or advanced degree, compared to 35 percent for the entire state of Missouri.

Educational Attainment
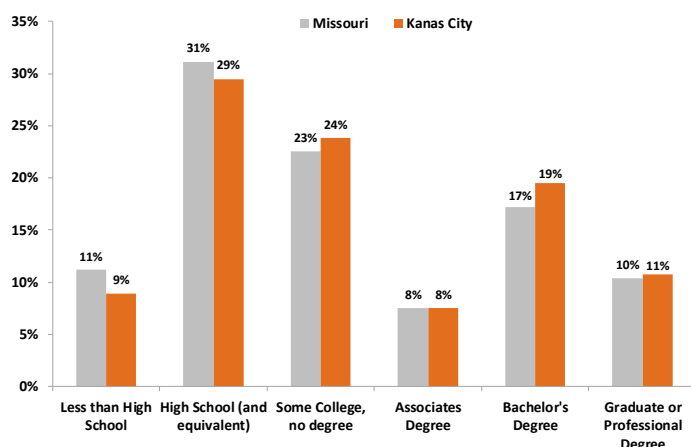
Source: US Census Bureau, LEHD, 4th Quarter 2016-3rd Quarter 2017

INDUSTRY ANALYSIS

In 2017, employment in the Kansas City region was nearly 548,500. Employment grew 1.6 percent from 2016 to 2017, adding over 8,400 new jobs. The Kansas City Region had the highest employment growth rates in Missouri from 2012 to 2017, averaging 1.9 percent growth per year.

Employment Annual Growth Rate
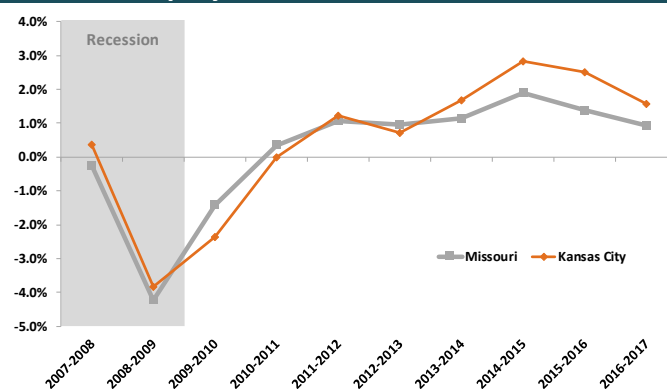
Source: MERIC, QCEW, 2017 Annual Average

Professional, Scientific & Technical Services led the way for job growth in the Kansas City region in 2017. This industry sector has been the driver of employment growth in the region for the past three years averaging 9 percent employment growth per year from 2014 to 2017. *Computer Systems Design Services*, *Marketing and Advertising Agencies,* and *Bio-technology R&D* are leading the way in employment growth in the industry sector.

Health Care & Social Assistance is the largest employer in the region, representing 15 percent of all employment. *Hospitals* and *Social Assistance* have been the drivers of employment growth within the industry sector the past two years—both adding over 750 new jobs in the region per year.

Table 1: Kansas City Region Top Industries by Employment

Industry	2012 Employment	2017 Employment	Net Change	2012-2017 Employment CAGR	2017 Average Annual Wages
Health Care and Social Assistance	72,394	81,767	9,373	2.5%	$50,257
Retail Trade	56,130	59,941	3,811	1.3%	$28,490
Accommodation and Food Services	48,016	55,135	7,119	2.8%	$19,208
Professional, Scientific, and Technical Services	36,871	48,740	11,869	5.7%	$84,391
Manufacturing	37,212	43,724	6,512	3.3%	$60,449
Educational Services	38,884	39,235	351	0.2%	$42,349
Finance and Insurance	28,762	28,051	(710)	-0.5%	$81,994
Admin and Support and Waste Management	24,665	27,704	3,039	2.4%	$33,452
Construction	21,456	27,516	6,060	5.1%	$63,522
Public administration	26,790	26,326	(463)	-0.3%	$61,555

Source: MERIC, QCEW, 2017 Annual Average

Service sector industries including *Accommodations & Food Services*, *Construction, and Retail Trade* have seen strong growth over the past five years. In 2017, the *Accommodation & Food Services* industry added 1,500 jobs, *Construction* added 1,050 jobs and *Retail* added 970.

Manufacturing employment fell by 330 in the region in 2017—representing the first decline in manufacturing employment in the region since 2012. From 2012 to 2017, *Manufacturing* added over 6,500 jobs, averaging 3.3 percent growth per year.

Transportation Equipment Manufacturing has predominantly been the driver of employment change within the *Manufacturing* sector over the past four years in the Kansas City region. From 2013 to 2016, *Transportation Equipment Manufacturing* added 5,900 jobs, and in 2017 employment fell 475 jobs.

Plastics & Rubber Product Manufacturing and *Computer & Electronic Product Manufacturing* added employment in the region in 2017, growing 4.9 percent and 4.5 percent respectively.

Location Quotient

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient describes the concentration of an industry in a geographical region, in relation to the nation, with 1.0 being the national average.

Table 2: Kansas City Region Location Quotients		
Industry	**Employment**	**Location Quotient**
Data Processing & Hosting	3,033	2.5
Transportation Equip. Mfg.	12,318	2.0
Performing Arts & Spectator Sports	3,004	1.6
Support Activities for Transportation	4,057	1.6
Professional, Scientific, & Technical Services	48,170	1.4
Securities & Commodity Contracts	4,703	1.3
Insurance Carriers & Related Activities	11,652	1.3

Source: MERIC, QCEW, 2017 Annual Average

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Largest Employers in Kansas City Region

The largest employers in the Kansas City Region come from a variety of industry sectors. Top health care employers include **Children's Mercy Hospital**, **St. Luke's Hospital**, **North Kansas City Hospital, Truman Medical Center** and **The Research Medical Center**.

Technology Companies such as **Cerner** and **DST Systems,** and manufactures such as **Ford** and **Honeywell** are located in the region. Engineering firm **Burns & McDonnell Engineering** and pharmaceutical consulting firm **Catalent** are large employers—as is **Hallmark**, with its corporate headquarters in Kansas City.

The **University of Missouri, Kansas City** is a major public sector employer in the region as is the **Federal Reserve Bank of Kansas City**.

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The Kansas City Region has high concentrations in *Data Processing*, *Transportation Equipment Manufacturing* and *Support Activities for Transportation*—which includes *Support Activities for Air and Rail Transportation* and *Freight Transportation Arrangement*.

LABOR MARKET ANALYSIS

Unemployment

The regional unemployment rate was 3.5 percent in June 2018, slightly down from 3.8 percent in June 2017. This mirrors state and national trends, representing a tight labor market—which means there are less workers looking for employment and employers are having to compete more for the labor that is available. It also means that some employers may have a hard time finding qualified employees for some positions. From June 2013 to June 2018, the unemployment rate dropped 3.8 percentage points.

Occupational Projections

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its **Now-Next-Later** categorization system to help job seekers understand the training, education and experience requirements for various occupations.

Now jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

Next jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates or some postsecondary education.

Later jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For **Now** occupations, front line service positions lead the way in total openings, including: *Food Service Workers*, *Cashiers*, *Retail Sales Persons*, and *Waiters & Waitresses* . *Home Health Aides* and *Personal Care Aides* are projected to be the fastest growing **Now** occupations over the next decade.

Truck Drivers, *Cooks*, and *Nursing Assistants* will have the most openings for the **Next** category of occupations. *Respiratory Therapists*, *Iron & Steel Workers*, and *Heating, Air Conditioning, & Refrigeration Mechanics/Installers* are the fastest growing **Next** occupations.

For **Later** occupations, *General & Operations Managers*, *Registered Nurses*, *Accountants, and Software Developers* will have the most openings. IT and data analysis jobs are some of the fastest growing positions including *Software Developers*, *Information Security Analysts*, and *Operations Research Analysts.*

Table 3: Kansas City Region Long-Term Occupational Projections							
Occupation	**2016 Estimated Employment**	**2026 Projected Employment**	**Growth Openings**	**Replacement Openings**	**Total Openings**	**Median Wages**	
NOW							
Food Prep. & Serving Workers	13,111	15,547	2,436	25,958	**28,394**	$18,897	🔥
Cashiers	13,555	14,124	569	25,675	**26,244**	$20,281	🔥
Retail Salespersons	16,191	16,574	383	23,373	**23,756**	$22,183	🔥
Waiters and Waitresses	11,092	11,993	901	21,634	**22,535**	$19,706	
Personal Care Aides	7,553	10,493	2,940	12,626	**15,566**	$21,932	
NEXT							
Heavy and Tractor-Trailer Truck Drivers	8,076	8,224	148	8,576	**8,724**	$45,470	🔥
Cooks, Restaurant	5,084	5,757	673	7,512	**8,185**	$25,699	🔥
Nursing Assistants	5,884	6,493	609	6,888	**7,497**	$26,684	🔥
Bookkeeping & Accounting Clerks	6,435	6,289	-146	6,996	**6,850**	$39,310	🔥
Food Prep. & Serving Workers Supervisors	4,242	4,687	445	6,260	**6,705**	$30,194	
LATER							
General and Operations Managers	9,829	10,847	1,018	8,310	**9,328**	$85,029	🔥
Registered Nurses	13,267	15,149	1,882	7,157	**9,039**	$64,974	🔥
Accountants and Auditors	7,403	8,294	891	6,833	**7,724**	$61,984	🔥
Software Developers, Applications	5,040	7,318	2,278	3,879	**6,157**	$94,035	🔥
Elementary School Teachers	6,172	6,820	648	4,549	**5,197**	$52,836	

🔥 *denotes occupations within the top ten for on-line job ads in 2017 in the region within the respective Now-Next-Later classification.*

Source: MERIC Occupational Projections, 2016-2026

Table 4: Kansas City Region Fastest Growing Occupations
NOW
Home Health Aides
Personal Care Aides
Cargo and Freight Agents
Nonfarm Animal Caretakers
Social and Human Service Assistants
NEXT
Respiratory Therapists
Structural Iron and Steel Workers
Heating, Air Conditioning, and Refrigeration Mechanics
Paralegals and Legal Assistants
Self-Enrichment Education Teachers
LATER
Software Developers, Applications
Information Security Analysts
Operations Research Analysts
Health Specialties Teachers, Postsecondary
Veterinarians

Note: Occupations with net increase of less than 60 are omitted.

*Source: MERIC Occupational Projections, 2016-2026*

Northeast Region

The Northeast Region consists of 16 counties in Northeastern Missouri. This region is home to several cities including, Kirksville, Hannibal, Moberly and Warrenton.

Several of Missouri's major highways cross through this region. Interstate 70 crosses the southern part of the region. In addition, Highway 63 and Highway 61 run north/south and Highway 24, Highway 54, Highway 36 and Highway 136 run east/west.

WORKFORCE DEMOGRAPHICS

The Northeast Region is home to over 79,300 employees, making up 3 percent of Missouri's workforce. In this report, workforce is defined as a the average regional monthly employment according to the 2017 Quarterly Census of Employment and Wages.

The workforce is getting older in the Northeast Region, a trend occurring throughout Missouri and the U.S. In the Northeast Region in 2017, 25 percent of the workforce was age 55 and older, up from 19 percent a decade earlier.

Northeast Region Workforce Age
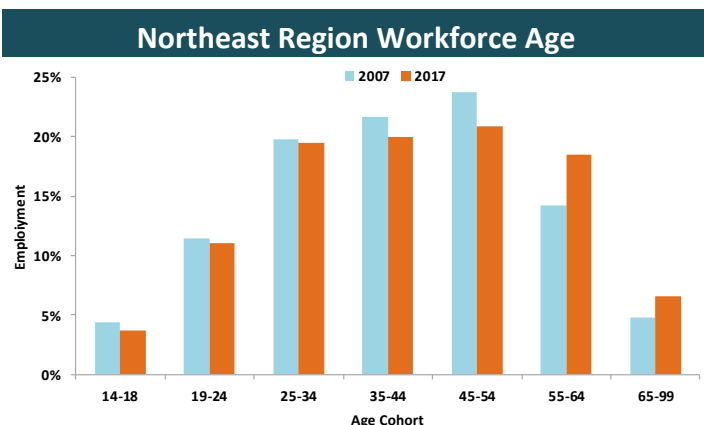
Source: US Census Bureau, LEHD, Annual Average 2016Q4 -2017Q3

In 2017, 51 percent of the workforce was female and 49 percent was male, which matches the Missouri average. For the region, 8 percent was non-white, compared to 17 percent for the state; 2 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 3 percent of the region's population ages 18 to 64 the primary language spoken at home is something other than English, in comparison to 6 percent for Missouri and 22 percent for the U.S. The Northeast Region has a higher percentage of the population with a disability compared to the state and nation. For the Northeast Region, 14 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

Educational attainment rates for the Northeast Region are behind those of the state in regards to higher education degree completion. Twenty-four percent of the

region's population have an associates, bachelor's or advanced degree, compared to 35 percent for the state among the population age 25 and older.

Educational Attainment

Source: US Census Bureau, ACS, 2012-2016 5-Year Estimates
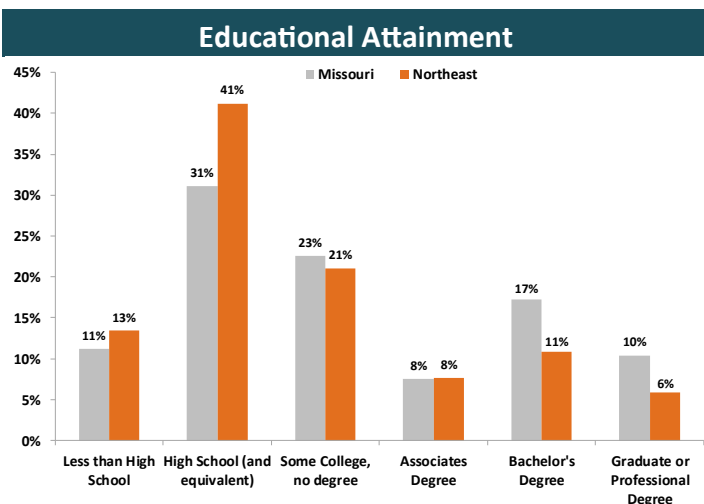
INDUSTRY ANALYSIS

In 2017, employment in the Northeast Region was nearly 79,400. The region lost 190 jobs from 2016 to 2017, declining 0.2 percent. Missouri employment grew 0.9 percent in that time. From 2012 to 2017, the Northeast Region averaged 0.7 percent growth, compared to 1.3 percent for Missouri.

Employment Annual Growth Rate

Source: MERIC, QCEW, 2017 Annual Average

For the second consecutive year, *Manufacturing* led job growth in the region, adding 350 jobs. From 2012 to 2017, *Manufacturing* grew an average 3 percent per year.

Food Manufacturing grew 19 percent, leading the way in employment growth within *Manufacturing* in the region and *Transportation Equipment Manufacturing* grew 11 percent. *Printing & Related Services*, *Plastics & Rubber Products Manufacturing, and Primary Metal Manufacturing* employment fell in 2017.
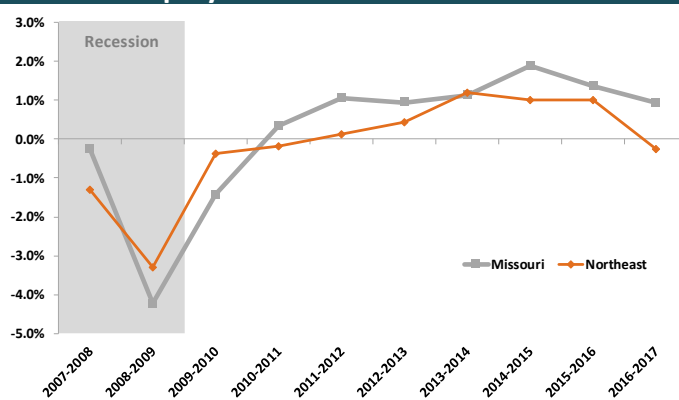
Health Care & Social Assistance continues to be the largest employer in the region, accounting for 16 percent of all employment. *Health Care & Social Assistance* lost 50 jobs in 2017. *Social Assistance* employment has been growing the past five years within the region, while

Table 1: Northeast Region Top Industries by Employment

Industry	2012 Employment	2017 Employment	Net Change	2012-2017 Employment CAGR	2017 Average Annual Wages
Health Care and Social Assistance	12,496	12,785	288	0.5%	$33,844
Retail Trade	10,746	11,139	392	0.7%	$23,121
Manufacturing	9,386	10,882	1,496	3.0%	$46,938
Educational Services	8,989	8,905	(83)	-0.2%	$35,762
Accommodation and Food Services	6,439	6,651	213	0.7%	$13,001
Public administration	5,139	4,944	(195)	-0.8%	$33,120
Construction	3,746	4,239	492	2.5%	$45,543
Transportation and Warehousing	3,284	3,662	377	2.2%	$41,038
Wholesale Trade	3,049	2,992	(57)	-0.4%	$48,572
Finance and Insurance	2,406	2,441	35	0.3%	$45,519

Source: MERIC, QCEW, 2017 Annual Average

Hospital, *Nursing & Residential Care Facilities,* and *Ambulatory Health Care Services* employment has declined.

Retail trade lost 215 jobs in 2017. *Building Material & Garden Equipment Dealers* had the largest employment losses among retailers, but job loss was spread across the industry sector. *General Merchandise Stores* employment increased by 150 in 2017.

Professional, Scientific, & Technical Services employment fell 7 percent in the region, representing 115 jobs. Other industries with declining employment included *Education Services*, *Construction*, *Public Administration* and *Arts & Entertainment*.

Location Quotient

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographical region, in relation to the nation, with 1.0 being the national average.

The Northeast Region has high concentrations in manufacturing including *Primary Metal Manufacturing*,

Table 2: Northeast Location Quotients		
Industry	**Employment**	**Location Quotient**
Primary Metal Mfg.	1,411	7.5
Nonstore Retailers	1,188	4.1
Gasoline Stations	1,907	4.0
Food Mfg.	2,599	3.2
Nursing & Residential Care Facilities	3,473	2.1
Machinery Mfg.	1,081	2.0
Truck Transportation	1,374	1.9
General Merchandise Stores	2,711	1.7
Building Material & Garden Equip. Dealers	1,041	1.6
Transportation Equip. Mfg.	1,162	1.4
Credit Intermediation & Related Activities	1,860	1.4
Merchant Wholesalers, Nondurable Goods	1,418	1.4

Source: MERIC, QCEW, 2017 Annual Average

Food Manufacturing, and *Machinery Manufacturing*. It also specializes in *Truck Transportation*.

LABOR MARKET ANALYSIS

Unemployment
The regional unemployment rate was 3.5 percent in June 2018, slightly down from 3.8 percent in June 2017. This mirrors state and national trends, representing a tight labor market—which means there are less workers looking for employment and employers are having to compete more for the labor that is available. It also means that some employers may have a hard time finding qualified employees for some positions. From June 2013 to June 2018, the unemployment rate dropped 3.7 percentage points.

Occupational Projections
MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its ***Now-Next-Later*** categorization system to help job seekers understand the training, education and experience requirements for various occupations.

Now jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

Next jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates or some postsecondary education.

Later jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For *Now* occupations front line service providers, such as *Cashiers* and *Retail Salespeople,* lead the way in total openings as well as food industry workers like *Food Prep & Service Workers* and *Waiters & Waitresses*. The fastest growing **Now** positions include *Pharmacy Technicians*, *Refuse & Recyclable Collectors*, *Hand Packers & Packagers,* and *Personal Care Aides.*

Truck Drivers, Nursing Assistants, *Retail Sales Supervisors*, and *Bookkeeping & Accounting Clerks* will have the most openings among the **Next** category of occupations. *Medical Assistants* as well as manufacturing/warehousing related occupations such as *First Line Supervisors of Handlers & Material Movers*, *Industrial Machinery Mechanics*, and *Machinists* are the fastest growing **Next** occupations.

For *Later* occupations, *General & Operations Managers* and *K12 Teachers* will have the most openings. The fastest growing occupations include *Market Research Analysts*, *Health Specialties Teachers*, and *Speech-Language Pathologists*.

Table 3: Northeast Region Long-Term Occupational Projections						
Occupation	2016 Estimated Employment	2026 Projected Employment	Growth Openings	Replacement Openings	Total Openings	Median Wages
NOW						
Cashiers	2,840	2,954	114	5,375	**5,489**	$18,502 🔥
Food Prep. & Serving Workers	1,647	1,777	130	3,101	**3,231**	$18,741 🔥
Waiters and Waitresses	1,687	1,665	-22	3,142	**3,120**	$18,891
Retail Salespersons	1,965	2,024	59	2,846	**2,905**	$21,765 🔥
Secretaries and Administrative Assistants	2,899	2,679	-220	2,963	**2,743**	$28,961
NEXT						
Heavy and Tractor-Trailer Truck Drivers	2,097	2,234	137	2,278	**2,415**	$39,265 🔥
Nursing Assistants	1,304	1,293	-11	1,445	**1,434**	$22,840 🔥
Retail Sales Supervisor	1,131	1,207	76	1,218	**1,294**	$33,320 🔥
Bookkeeping & Accounting Clerks	989	971	-18	1,078	**1,060**	$31,173
Cooks, Restaurant	577	598	21	814	**835**	$19,480 🔥
LATER						
General and Operations Managers	1,402	1,498	96	1,166	**1,262**	$60,599 🔥
Elementary School Teachers	1,350	1,467	117	986	**1,103**	$44,731
Secondary School Teachers	1,083	1,175	92	767	**859**	$39,819
Farmers, Ranchers, and Other Ag. Managers	1,076	1,110	34	801	**835**	n/a
Registered Nurses	1,201	1,340	139	640	**779**	$52,629 🔥

🔥 denotes occupations within the top ten for on-line job ads in 2017 in the region within the respective Now-Next-Later classification.

Source: MERIC Occupational Projections, 2016-2026

Table 4: Northeast Region Fastest Growing Occupations

NOW

Pharmacy Technicians

Refuse and Recyclable Material Collectors

Packers and Packagers

Personal Care Aides

Medical Secretaries

NEXT

Medical Assistants

Supervisors of Laborers and Material Movers

Industrial Machinery Mechanics

Machinists

Teacher Assistants

LATER

Market Research Analysts and Marketing Specialists

Health Specialties Teachers, Postsecondary

Speech-Language Pathologists

Mental Health and Substance Abuse Social Workers

Child, Family, and School Social Workers

Note: Occupations with net increase of less than 30 are omitted.

Source: MERIC Occupational Projections, 2016-2026

Source: MERIC Occupational Projections

Northwest Region

The Northwest Region is made up of 18 counties in the Northwest corner of Missouri. The region is home to several cities including, St. Joseph, Chillicothe, Trenton, and Maryville.

Many of Missouri's major highways cross through this region. Interstate 29 runs through the western part of the region, while Interstate 35 crosses the middle. Highway 36 and Highway 136 run east/west. Highways 59, Highway 159, Highway 71, Highway 169, Highway 69 and Highway 65 run north/south.

WORKFORCE DEMOGRAPHICS

The Northwest Region is home to nearly 95,000 employees, making up 4 percent of Missouri's workforce. In this report, workforce is defined as a the average regional monthly employment according to the 2017 Quarterly Census of Employment and Wages.

The workforce is getting older in the Northwest Region, a trend occurring throughout Missouri and the U.S. In 2017, 24 percent of the workforce was age 55 and older, up from 18 percent a decade earlier.

In 2017, 51 percent of the workforce was female and 49 percent was male, which matches Missouri. Eight percent of the region's workforce was non-white, compared to 17 percent for the state; 4 percent was Hispanic or Latino, which matches Missouri.

For 5 percent of the region's population ages 18 to 64, the primary language spoken at home is something other than English—compared to 6 percent for Missouri and 22 percent for the US. In the Northwest Region, 13 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

Educational attainment rates for the Northwest Region are behind those of Missouri in regards to bachelor's or advanced degrees. Twenty-six percent of the region's population, age 25 and older, has an associates, bachelor's or advanced degree, compared to 35 percent for Missouri.

Northwest Region Workforce Age
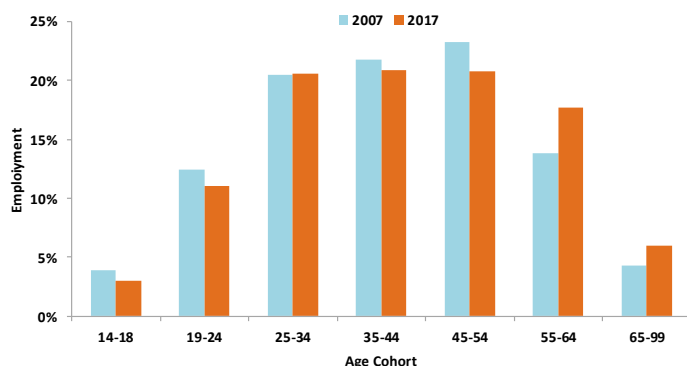
Source: US Census Bureau, LEHD, Annual Average 2016Q4 -2017Q3

Educational Attainment
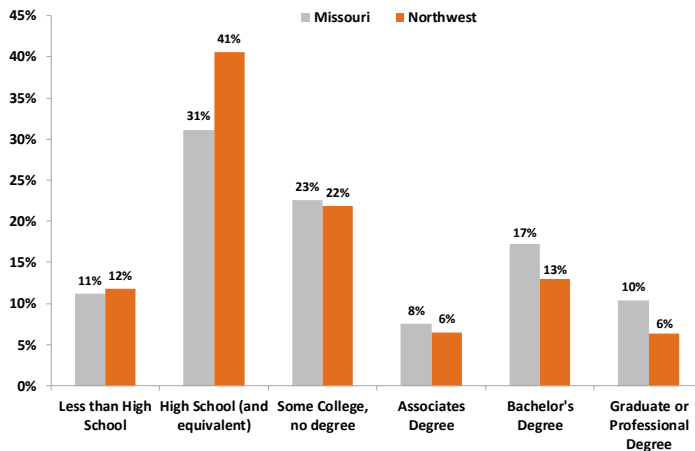
Source: US Census Bureau, ACS, 2012-2016 5-Year Estimates

Employment Annual Growth Rate

Source: MERIC, QCEW, 2017 Annual Average

INDUSTRY ANALYSIS

In 2017, employment in the Northwest Region was nearly 95,000. Employment in the region fell 0.1 percent from 2016 to 2017, losing 95 jobs. Missouri employment grew 0.9 percent in that time. From 2012 to 2017, the Northwest region averaged 0.5 percent employment growth per year, compared to 1.3 percent for the state.

Manufacturing is the largest employer in the region, employing over 15,800. It added 150 jobs to the regional economy, a 1 percent growth for the industry. *Fabricated Metal Product Manufacturing* led the growth within the

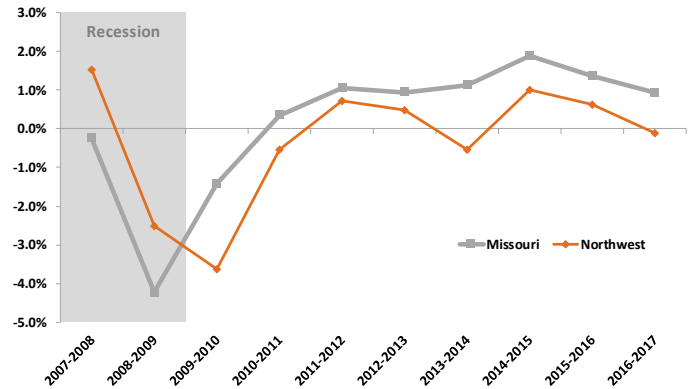industry sector, adding over 125 jobs. Smaller employment gains were made in *Petroleum & Coal Product Manufacturing*, *Electrical Equipment & Appliance* Manufacturing, and *Apparel Manufacturing*.

Health Care & Social Assistance, the second largest employer in the region, added 130 jobs in 2017. *Health Care & Social Assistance* employment gains have been modest (less than 1 percent) in each of the past four years.

Retail Trade had the largest employment decline in 2017 in the region, losing 120 jobs. *Information* employment fell by over 100 as did *Administrative & Support Services*.

Table 1: Northwest Region Top Industries by Employment

Industry	2012 Employment	2017 Employment	Net Change	2012-2017 Employment CAGR	2017 Average Annual Wages
Manufacturing	15,230	15,869	639	0.8%	$54,825
Health Care and Social Assistance	14,665	15,484	819	1.1%	$41,067
Retail Trade	12,026	12,244	218	0.4%	$24,828
Educational Services	8,911	8,900	(11)	0.0%	$34,740
Accommodation and Food Services	7,390	7,260	(130)	-0.4%	$13,728
Public administration	6,705	6,289	(416)	-1.3%	$35,115
Admin and Support and Waste Management	3,292	4,018	726	4.1%	$30,762
Construction	3,744	3,966	222	1.2%	$53,190
Wholesale Trade	3,207	3,380	173	1.1%	$46,972
Transportation and Warehousing	3,154	3,262	108	0.7%	$39,434

Source: MERIC, QCEW, 2017 Annual Average

Location Quotient

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient describes the concentration of an industry in a geographical region, in relation to the nation, with 1.0 being the national average.

The Northwest Region has a high concentration in *Animal Production* and in manufacturing, including: *Food Manufacturing*, *Chemical Manufacturing*, *Fabricated Metal Product Manufacturing* and *Machinery Manufacturing*.

Table 2: Northwest Region Location Quotients		
Industry	**Employment**	**Location Quotient**
Animal Production	1,271	7.8
Food Mfg.	6,196	6.3
Chemical Mfg.	1,694	3.3
Fabricated Metal Product Mfg.	2,786	3.2
Gasoline Stations	1,698	2.9
Machinery Mfg.	1,540	2.3
Nursing & Residential Care Facilities	3,946	1.9
Building Material & Garden Equip. Dealers	1,306	1.6
General Merchandise Stores	3,046	1.6
Merchant Wholesalers, Nondurable Goods	1,851	1.5

Source: MERIC, QCEW, 2017 Annual Average

LABOR MARKET ANALYSIS

Unemployment

The regional unemployment rate was 3.3 percent in June 2018, slightly down from 3.6 percent in June 2017. This mirrors state and national trends, representing a tight labor market—which means there are less workers looking for employment and employers are having to compete more for the labor that is available. It also means that some employers may have a hard time finding qualified employees for some positions. From June 2013 to June 2018, the unemployment rate dropped 3.3 percentage points.

Largest Employers in Northwest Region

The Region's top employers are in health care and advanced manufacturing. The top health care employer is the **Heartland Regional Medical Center**.

Boehringer Ingelheim is a major employer in chemical manufacturing. Top employing food manufacturers include **Triumph Foods** and **Smithfield Farmland**. **Kawaski Motors** is a major machinery manufacturer, and **Altec Industries** is a large fabricated metals manufacturer. **American Family Insurance** is also a major employer in the region.

Northwest Missouri State University is a major public employer in the region as is the **Western Missouri Correctional Center**.

Occupational Projections

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its *Now-Next-Later* categorization system to help job seekers understand the training, education and experience requirements for various occupations.

Now jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

Next jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates or some postsecondary education.

Later jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For **Now** occupations, *Cashiers*, *Food Service Workers* and *Retail Salespersons* lead the way in projected total openings. *Production Worker Helpers*, *Refuse & Recyclable Material Collectors*, and *Personal Care Aides* are projected to be the fastest growing **Now** occupations over the next decade.

Nursing Assistants and *Truck Drivers* will have the most openings for the **Next** category of occupations. *Veterinary Technicians*, *Industrial Machinery Mechanics*, and *Medical Assistants* are the fastest growing **Next** occupations.

For **Later** occupations, *K12 Teachers, Registered Nurses, and General & Operations Managers* will have the most openings. *Industrial Engineers* and *Market Research Analysts* are the fastest growing **Later** occupations.

Table 3: Northwest Region Long-Term Occupational Projections						
Occupation	**2016 Estimated Employment**	**2026 Projected Employment**	**Growth Openings**	**Replacement Openings**	**Total Openings**	**Median Wages**
NOW						
Cashiers	3,556	3,465	-91	6,513	**6,422**	$18,928 🔥
Food Prep. & Serving Workers	2,932	3,092	160	5,456	**5,616**	$18,976 🔥
Retail Salespersons	2,752	2,793	41	3,955	**3,996**	$22,659 🔥
Laborers & Material Movers	2,155	2,419	264	3,088	**3,352**	$25,040 🔥
Secretaries and Administrative Assistants	3,135	2,842	-293	3,176	**2,883**	$27,823
NEXT						
Nursing Assistants	2,188	2,259	71	2,475	**2,546**	$21,523 🔥
Heavy and Tractor-Trailer Truck Drivers	1,385	1,349	-36	1,439	**1,403**	$38,148 🔥
First-Line Supervisors of Retail Sales Workers	1,109	1,136	27	1,169	**1,196**	$36,237 🔥
Bookkeeping & Accounting Clerks	1,073	1,034	-39	1,158	**1,119**	$32,504
Cooks, Restaurant	603	611	8	842	**850**	$21,863 🔥
LATER						
Secondary School Teachers	2,063	2,060	-3	1,400	**1,397**	$42,076
Registered Nurses	2,195	2,406	211	1,159	**1,370**	$58,606 🔥
General and Operations Managers	1,284	1,351	67	1,059	**1,126**	$69,714 🔥
Elementary School Teachers	1,092	1,088	-4	764	**760**	$39,530
Middle School Teachers	780	778	-2	545	**543**	$46,024

🔥 denotes occupations within the top ten for on-line job ads in 2017 in the region within the respective Now-Next-Later classification.

Source: MERIC Occupational Projections, 2016-2026

Table 4: Northwest Region Fastest Growing Occupations
NOW
Helpers--Production Workers
Refuse and Recyclable Material Collectors
Personal Care Aides
Chemical Equipment Operators and Tenders
Machine Setters, Operators, and Tenders
NEXT
Veterinary Technologists and Technicians
Industrial Machinery Mechanics
Medical Assistants
Supervisors of Laborers and Material Movers
Sheet Metal Workers
LATER
Industrial Engineers
Market Research Analysts and Marketing Specialists
Financial Managers
Mental Health Counselors
Accountants and Auditors

Note: Occupations with net increase of less than 20 are omitted.

*Source: MERIC Occupational Projections, 2016-2026*

Ozark Region

The Ozark Region is composed of seven counties in Southwest Missouri. This region is home to several cities including Marshfield, Republic, Nixa, Ozark, Branson and the larger Springfield metropolitan statistical area.

Many of Missouri's major highways cross through this region. Interstate 44 runs through the center of the region. In addition, Highway 60 and Highway 160 cross east/west through the region while Highway 65 runs north/south.

WORKFORCE DEMOGRAPHICS

The Ozark Region workforce has over 235,300 employees, making up 9 percent of Missouri employment. In this report, workforce is defined as a the average regional monthly employment according to the 2017 Quarterly Census of Employment and Wages.

The workforce is getting older in the Ozark Region, a trend occurring throughout Missouri and the U.S. In the Ozark Region in 2017, 22 percent of the workforce was age 55 or older, up from 17 percent a decade earlier.

Ozark Region Workforce Age

Source: US Census Bureau, LEHD, Annual Average 2016Q4 -2017Q3
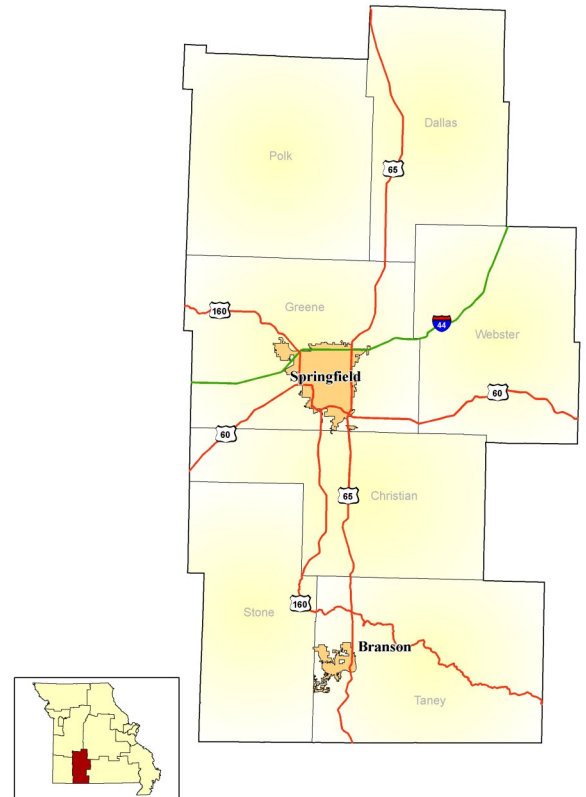
In 2017, there was a 50/50 split between females and males in the Ozark Region workforce; Missouri's workforce was made up of 51 percent female and 49 percent male. For the region, 8 percent of the workforce was non-white, compared to 17 percent for the state; 3 percent was Hispanic or Latino, compared to 4 percent for Missouri.

For 5 percent of the region's population ages 18 to 64 the primary language spoken at home is something other then English, compared to 6 percent for Missouri and 22 percent for the U.S. In the region, 13 percent of the population, age 18 to 64, has a disability, which matches the Missouri rate. The U.S. has 10 percent of the population with a disability.
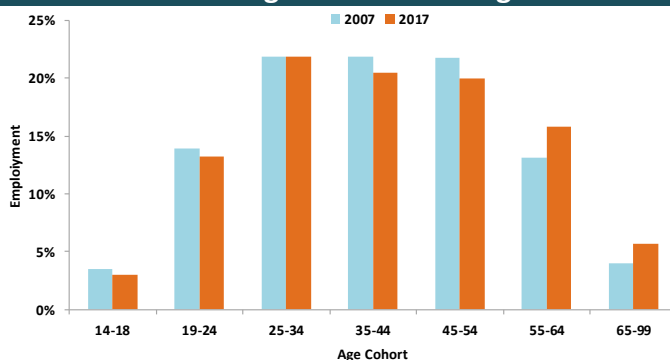
Educational attainment rates for the Ozark region are below Missouri for those with bachelor's or advanced degrees. Thirty-two percent of the region's population, age 25 and older, has an associates, bachelor's or professional degree; Missouri has 35 percent of its population with those credentials.

Educational Attainment

Source: US Census Bureau, ACS, 2012-2016 5-Year Estimates

Employment Annual Growth Rate

Source: MERIC, QCEW, 2017 Annual Average

INDUSTRY ANALYSIS

In 2017, employment in the Ozark Region was over 235,300. Employment in the region grew 1.5 percent from 2016 to 2017, adding 3,500 jobs. Missouri employment grew 0.9 percent in that time. Form 2012 to 2017, the Ozark Region averaged 1.7 percent employment growth per year, compared to 1.3 percent for the state.
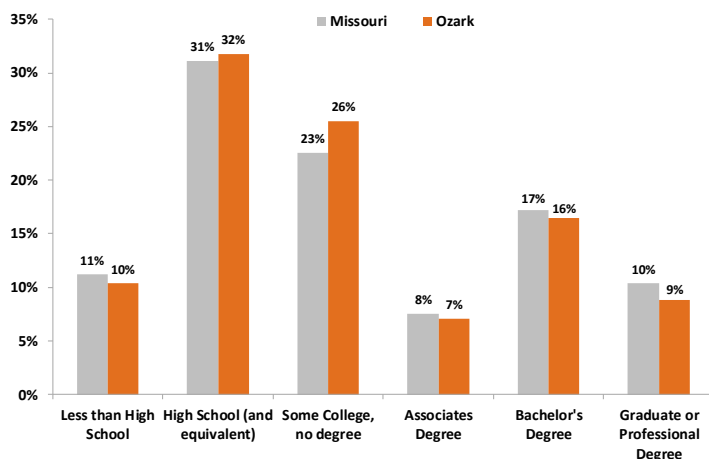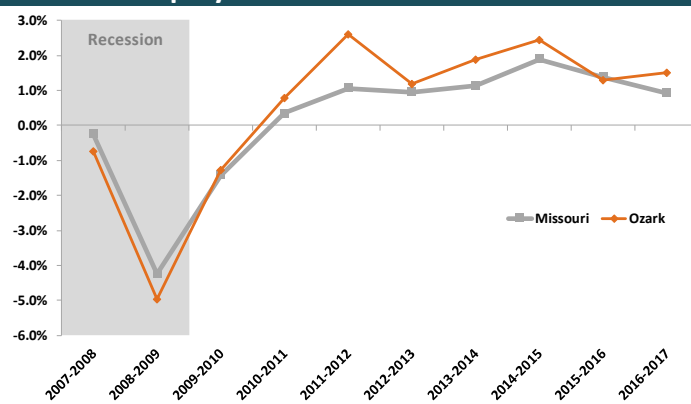
The Ozark region is a transportation hub and has a comparative advantage in goods distribution. In 2017, *Transportation & Warehousing* and *Manufacturing* each had significant employment increases.

Transportation and Warehousing employment growth was almost completely driven by employment gains in *Truck Transportation* which grew by 14 percent in 2017, adding over 900 jobs in the region. *Truck Transportation* has shown high levels of employment growth over the past five years, averaging 6 percent growth per year.

Table 1: Ozark Region Top Industries by Employment					
Industry	2011 Employment	2016 Employment	Net Change	2011-2016 Employment CAGR	2016 Average Annual Wages
Health Care & Social Assistance	36,582	39,382	2,801	1%	$49,283
Retail Trade	29,691	31,596	1,905	1%	$26,776
Accommodation & Food Services	26,415	29,974	3,558	3%	$18,311
Manufacturing	14,336	15,354	1,018	1%	$45,782
Educational Services	14,029	14,338	309	0%	$35,532
Admin & Support & Waste Management	12,419	14,120	1,701	3%	$31,907
Transportation & Warehousing	9,377	12,179	2,802	5%	$48,329
Construction	9,467	10,851	1,383	3%	$43,505
Wholesale Trade	9,642	10,662	1,020	2%	$48,908
Professional, Scientific, & Technical Services	5,842	8,940	3,099	9%	$51,785

Source: MERIC, QCEW, 2017 Annual Average

Manufacturing growth was dispersed among a diverse set of manufacturing sub-industries. *Food Manufacturing* had 21 percent employment growth in 2017 in the region, adding nearly 500 new jobs. The previous year, *Food Manufacturing* added over 350 jobs. *Machine Manufacturing* added over 100 jobs to the region, although that follows three years of employment decline. *Computer Equipment and Electronic Product Manufacturing* grew 10 percent in 2017 and has had 5 percent employment growth or more in each of the last five years.

Service related industries also grew in the Ozark religion in 2017. *Health Care & Social Assistance*, the largest employing industry sector in the region, added over 1,000 jobs. With *Hospitals* adding 600 new jobs and *Social Assistance* adding 400*.*

Service industry sectors associated with tourism, such as *Accommodation & Food Services* have grown as well. *Accommodations* employment grew 6 percent in 2017, averaging 4 percent growth per year from 2012 to 2017. The growth rate of *Food Services & Drinking Places*

Largest Employers in Ozark Region

Top health care employers include **CoxHealth** and **Mercy Hospital Springfield.**

New Prime, Inc. is a major employer within truck transportation. **Kraft Food** and **Loren Cook** are major manufacturers. **Jack Henry & Assoicates** is a major employer in Computer Systems Design. There are call centers for **Chase Bank Cardservices**, **Hotels.com** and **T-Mobile**. **Bass Pro Shops** and **O'Reilly Automotive** have their corporate headquarters in the region.

Missouri State University is a major public sector employer in the region as is **Ozarks Technical Community College**.

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employment was lower at 2 percent per year from 2012 to 2017, but the industry contributed nearly 2,300 new jobs to the regional economy in that time.

Location Quotient

To understand the major industries within a region, an analysis of industry concentration of clustering can be useful. The Location Quotient describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average.

The Ozark Region has high concentrations in *Truck Transportation* and in industries related to tourism, including *Performing Arts, Accommodation,* and specialty retail stores.

Table 2: Ozark Region Location Quotients		
Industry	**Employment**	**Location Quotient**
Truck Transportation	6,500	2.6
Performing Arts & Spectator Sports	2,153	2.6
Accommodation	7,466	2.2
Sport, Hobby, Musical, & Book Store	1,915	1.9
Hospitals	15,348	1.8
Nonstore Retailers	1,647	1.8
Gasoline Stations	2,412	1.5
Telecommunications	1,955	1.4
Misc. Store Retailers	2,019	1.4
General Merchandise Stores	7,468	1.4

Source: MERIC, QCEW, 2017 Annual Average

LABOR MARKET ANALYSIS

Unemployment

The regional unemployment rate was 3.1 percent in June 2018, slightly down from 3.5 percent in June 2017. This mirrors state and national trends, representing a tight labor market—which means there are less workers looking for employment and employers are having to compete more for the labor that is available. It also means that some employers may have a hard time finding qualified employees for some positions. From June 2013 to June 2018, the unemployment rate dropped 3.6 percentage points.

Occupational Projections

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its **Now-Next-Later** categorization system to help job seekers understand the training, education and experience requirements for various occupations.

Now jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

Next jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates or some postsecondary education.

Later jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For **Now** occupations, front line service positions lead the way in total openings including: *Food Prep & Serving Workers, Retail Salespeople, Cashiers, Waiters/ Waitresses,* and *Customer Service Reps*. *Home Health Aides* and *Personal Care Aides* are the fastest growing **Now** occupations.

Truck Drivers, *Nursing Assistants*, and *Cooks* will have the most openings for the **Next** category of occupations. *Respiratory Therapists*, *Paralegals*, *Plumbers, Pipefitters & Steamfitters*, and *HVAC and Refrigeration Mechanics & Installers*, are the fastest growing **Next** occupations.

For **Later** occupations, *Registered Nurses*, *General & Operations Managers*, and *K12 Teachers* will have the most openings. *Software Developers* and health care related positions such as *Nurse Practitioner* and *Physical Assistants* are the fastest growing.

Table 3: Ozark Region Long-Term Occupational Projections						
Occupation	**2016 Estimated Employment**	**2026 Projected Employment**	**Growth Openings**	**Replacement Openings**	**Total Openings**	**Median Wages**
NOW						
Food Prep. & Serving Workers	7,753	9,613	1,860	15,730	**17,590**	$18,893 🔥
Retail Salespersons	9,195	10,215	1,020	13,846	**14,866**	$22,200 🔥
Cashiers	7,206	7,775	569	13,897	**14,466**	$19,220 🔥
Waiters and Waitresses	5,131	5,756	625	10,202	**10,827**	$18,529
Customer Service Representatives	5,380	6,043	663	7,205	**7,868**	$29,172 🔥
NEXT						
Heavy and Tractor-Trailer Truck Drivers	7,473	8,767	1,294	8,544	**9,838**	$40,620 🔥
Nursing Assistants	3,952	4,720	768	4,825	**5,593**	$23,266 🔥
Cooks, Restaurant	3,218	3,761	543	4,836	**5,379**	$20,320 🔥
First-Line Supervisors of Retail Sales Workers	3,141	3,494	353	3,456	**3,809**	$38,044 🔥
Bookkeeping & Accounting Clerks	2,659	2,845	186	3,026	**3,212**	$32,272 🔥
LATER						
Registered Nurses	6,385	8,006	1,621	3,624	**5,245**	$54,224 🔥
General and Operations Managers	3,609	4,168	559	3,125	**3,684**	$72,391 🔥
Secondary School Teachers	2,375	2,736	361	1,736	**2,097**	$46,174
Accountants and Auditors	1,433	1,727	294	1,375	**1,669**	$54,024
Elementary School Teachers	1,738	2,001	263	1,309	**1,572**	$54,929

🔥 *denotes occupations within the top ten for on-line job ads in 2017 in the region within the respective Now-Next-Later classification.*

Source: MERIC Occupational Projections, 2016-2026

Table 4: Ozark Region Fastest Growing Occupations
NOW
Home Health Aides
Personal Care Aides
Veterinary Assistants
Police and Sheriff's Patrol Officers
Police, Fire, and Ambulance Dispatchers
NEXT
Respiratory Therapists
Paralegals and Legal Assistants
Plumbers, Pipefitters, and Steamfitters
Heating, Air Conditioning, and Refrigeration Mechanics
Physical Therapist Assistants
LATER
Software Developers, Applications
Nurse Practitioners
Physician Assistants
Nursing Instructors and Teachers, Postsecondary
Veterinarians

Note: Occupations with net increase of less than 50 are omitted.

Source: MERIC Occupational Projections, 2016-2026

South Central Region

The South Central Region consists of 12 counties in the center of the southern portion of Missouri. The region is home to several cities including West Plains and Poplar Bluff.

Many of Missouri's major highways cross through this region. Highway 60 and Highway 160 run east/west through the region. Highway 63 and Highway 67 cross through the region north/south.
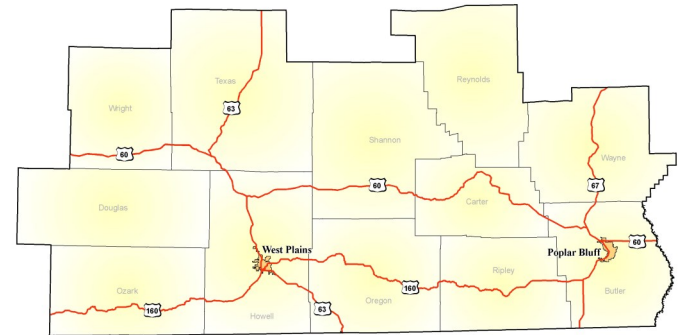
WORKFORCE DEMOGRAPHICS

The South Central Region workforce has over 59,800 employees, making up 2 percent of Missouri employment. In this report, workforce is defined as a the average regional monthly employment according to the 2017 Quarterly Census of Employment and Wages.

The workforce is getting older in the South Central Region, a trend occurring throughout Missouri and the U.S. In the region in 2017, 24 percent of the workforce was age 55 and older, up from 18 percent a decade earlier.

In 2017, 55 percent of the workforce was female and 45 percent was male, which compares to a 51/49 split for female and male workers in Missouri. For the region, 6 percent of the workforce was non-white, compared to 17 percent for the state; 2 percent was Hispanic or Latino, compared to 4 percent for Missouri.

For 2 percent of the region's population ages 18 to 64 the primary language spoken at home is something other than English, compared to 6 percent for Missouri and 22 percent for the US. The South Central Region has a higher percentage of the population with a disability compared to the state and nation. For the South Central Region, 22 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the US.

Educational attainment rates for the South Central Region are behind those of the state. Twenty percent of the region's population has an associates, bachelor's or advanced degree, compared to 35 percent of the state.

South Central Region Workforce Age
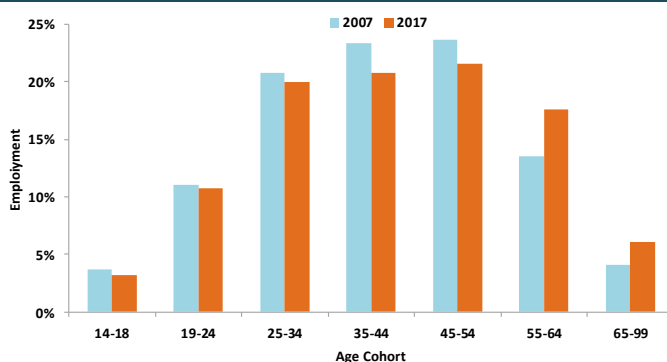
Source: US Census Bureau, LEHD, Annual Average 2016Q4 -2017Q3

Educational Attainment

Employment Annual Growth Rate

INDUSTRY ANALYSIS

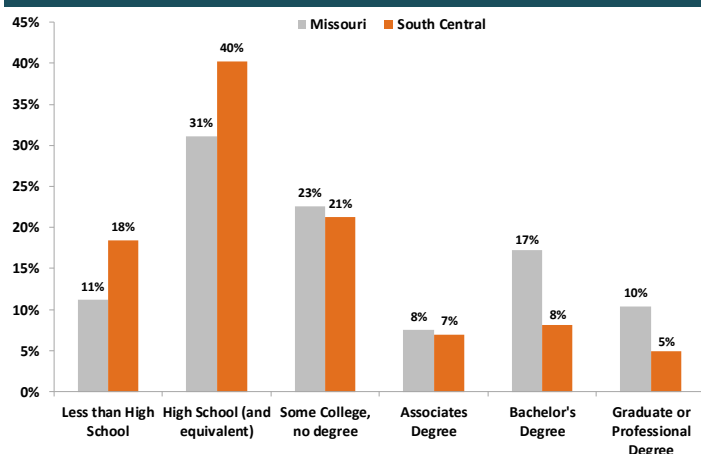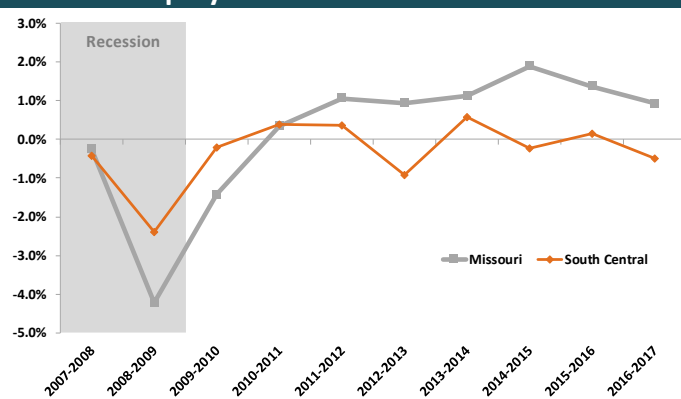In 2017, employment in the South Central Region was over 59,800. Employment in the region fell 0.5 percent from 2016 to 2017—Missouri employment grew 0.9 percent in that time. From 2012 to 2017, the South Central Region averaged –0.2 percent employment growth annually, compared to 1.3 percent for the state.

Health Care & Social Assistance is the largest employer in the region, with 12,872 employees in 2017. This industry sector added 180 new jobs to the regional economy in 2017. A majority of that growth is attributed to *Social Assistance*, which added 140 jobs. *Nursing & Residential*

Care Facilities added over 70 jobs. *Ambulatory Health Care Services* employment remained flat the past two years while *Hospital* employment dropped 1 percent in each of the past two years.

Manufacturing continues to be the driver of the regional economy, as it is the main export-related industry sector. *Manufacturing* employment stayed relatively even in 2017. From 2012 to 2017, employment fell an average 3 percent per year.

Wood Product Manufacturing, the largest industry within the manufacturing industry sector for the region, has had declining employment since 2013. *Machinery*

Table 1: South Central Region Top Industries by Employment

Industry	2012 Employment	2017 Employment	Net Change	2012-2017 Employment CAGR	2017 Average Annual Wages
Health Care and Social Assistance	11,518	12,872	1,353	2.2%	$31,050
Manufacturing	9,702	8,504	(1,198)	-2.6%	$34,553
Retail Trade	8,285	8,348	63	0.2%	$23,217
Educational Services	5,956	5,813	(144)	-0.5%	$31,702
Accommodation and Food Services	4,581	5,099	518	2.2%	$13,380
Public administration	3,522	3,504	(18)	-0.1%	$34,204
Admin and Support and Waste Management	2,176	2,086	(90)	-0.8%	$18,745
Wholesale Trade	1,671	1,886	216	2.5%	$39,449
Construction	1,807	1,875	68	0.7%	$36,991
Transportation and Warehousing	1,981	1,835	(146)	-1.5%	$37,479

Manufacturing and *Transportation Equipment Manufacturing* are also large employers in the region. *Machinery Manufacturing* has averaged 8 percent employment loss per year from 2012 to 2017 while *Transportation Equipment Manufacturing* employment has remained mostly unchanged.

Fabricated Metal Product Manufacturing grew in 2017 and has averaged 2 percent employment growth per year from 2012 to 2017. *Food Manufacturing* was the fastest growing manufacturing industry in 2017, reversing three years of employment losses. *Transportation & Warehousing*, an industry related to manufacturing, had 7 percent employment decline in 2017.

Service related industries had employment decline within the region in 2017. *Retail Trade* employment fell 3 percent, losing 290 jobs. *Administrative & Support Services* and *Professional, Scientific, & Technical Services* lost 100 jobs each in 2017.

Location Quotient

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient describes the concentration of an industry in a geographical region, in relation to the nation, with 1.0 being the national average.

Largest Employers in South Central Region

Top employing health care providers in the region include **Ozarks Medical Center**, **Poplar Bluff Regional Medical Center**, **Texas County Memorial Hospital** as well as the **John J. Pershing VA Medical Center.**

Major manufactures include **Briggs and Stratton,** the **Gates Corporation, DRS Technologies** and **Libla Industries**. **Armstrong Hardwood Flooring Company** is a major wood product manufacturer.

Top employing public employers include the **South Central Correctional Center** and **Three Rivers Community College**.

The South Central Region has high concentrations in advanced manufacturing, including, *Wood Product Manufacturing, Machinery Manufacturing*, *Plastics & Rubber Manufacturing,* and *Electrical Equipment & Appliance Manufacturing*. It also has a concentration in *Mining*—particularly in crushed and broken Stone mining and quarrying.

Table 2: South Central Region Location Quotients		
Industry	**Employment**	**Location Quotient**
Wood Product Mfg.	1,865	12.1
Mining (except Oil & Gas)	531	7.4
Machinery Mfg.	1,648	4.0
Gasoline Stations	1,150	3.2
Plastics & Rubber Products Mfg.	791	2.9
Electrical Equip. & Appliancet Mfg.	394	2.6
Social Assistance	3,495	2.4
Nursing & Residential Care Facilities	2,958	2.3
General Merchandise Stores	2,273	1.9
Utilities	396	1.8
Truck Transportation	985	1.7
Building Material & Garden Equip. Dealers	864	1.7
Printing & Related Support Activities	264	1.5
Fabricated Metal Product Mfg.	847	1.5

Source: MERIC, QCEW, 2017 Annual Average

LABOR MARKET ANALYSIS

Unemployment

The regional unemployment rate was 5.2 percent in June 2018, slightly up from 4.9 percent in June 2017. The unemployment rate is high relative to other areas in the state and the increase in unemployment rate from 2017 to 2018 is counter to the rest of Missouri. The region did have total job decline in 2017, which would impact the employment rate of the region. From June 2013 to June 2018, the unemployment rate dropped 3.7 percentage points.

Occupational Projections

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its ***Now-Next-Later***

categorization system to help job seekers understand the training, education and experience requirements for various occupations.

Now jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

Next jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates or some postsecondary education.

Later jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For **Now** occupations, *Food Service Workers, Cashiers*, and *Personal Care Aides* lead the way in total openings. *Production Worker Helpers* and *Personal Care Aides* are projected to be the fastest growing **Now** occupations over the next decade.

Nursing Assistants, *Truck Driverrs,* and *Retail Sales Supervisors will* have the most openings for the **Next** category of occupations. *Medical Assistants*, *Machinists*, *Computer User Support Specialists*, and *Nursing Assistants* will be the fastest growing **Next** occupations.

For **Later** occupations, *K12 Teachers*, *Registered Nurses*, and *General & Operations Managers* will have the most opening. Healthcare related occupations, including *Nurse Practitioners*, *Physical Therapists*, and *Healthcare Social Workers,* are the fastest growing **Later** occupations.

Table 3: South Central Region Long-Term Occupational Projections							
Occupation	**2016 Estimated Employment**	**2026 Projected Employment**	**Growth Openings**	**Replacement Openings**	**Total Openings**	**Median Wages**	
NOW							
Food Prep. & Serving Workers	2,057	2,373	316	4,012	**4,328**	$18,320	🔥
Cashiers	2,157	2,136	-21	3,982	**3,961**	$18,925	🔥
Personal Care Aides	2,012	2,642	630	3,256	**3,886**	$19,453	🔥
Retail Salespersons	2,013	2,086	73	2,924	**2,997**	$24,053	🔥
Helpers--Production Workers	1,103	1,582	479	1,998	**2,477**	$21,196	
NEXT							
Nursing Assistants	1,406	1,558	152	1,649	**1,801**	$19,666	🔥
Heavy and Tractor-Trailer Truck Drivers	1,234	1,247	13	1,305	**1,318**	$32,471	
Retail Sales Supervisor	1,025	1,101	76	1,107	**1,183**	$35,096	🔥
Bookkeeping & Accounting Clerks	702	689	-13	765	**752**	$28,516	🔥
Teacher Assistants	693	689	-4	694	**690**	$19,873	
LATER							
Elementary School Teachers	1,716	1,688	-28	1,192	**1,164**	$37,324	
Registered Nurses	1,352	1,513	161	721	**882**	$53,041	🔥
General and Operations Managers	691	736	45	574	**619**	$64,999	
Child, Family, and School Social Workers	327	359	32	341	**373**	$35,381	
Middle School Teachers	529	520	-9	367	**358**	$39,438	

🔥 *denotes occupations within the top ten for on-line job ads in 2017 in the region within the respective Now-Next-Later classification.*

Source: MERIC Occupational Projections, 2016-2026

Table 4: South Central Region Fastest Growing Occupations

NOW

Helpers--Production Workers

Personal Care Aides

Veterinary Assistants

Pharmacy Technicians

Loan Interviewers and Clerks

NEXT

Medical Assistants

Machinists

Computer User Support Specialists

Nursing Assistants

Emergency Medical Technicians and Paramedics

LATER

Nurse Practitioners

Physical Therapists

Healthcare Social Workers

Loan Officers

Medical and Health Services Managers

Note: Occupations with net increase of less than 25 are omitted.

Source: MERIC Occupational Projections, 2016-2026

Southeast Region

The Southeast Region consists of 13 counties in the southeast portion of Missouri. The region is home to several cities including, Cape Girardeau, Sikeston, Caruthersville and Park Hills.

Many of Missouri's major highways cross through the region. Interstate 55 runs north/south through the eastern part of the region, while Interstate 57 travels east/west through the central part. In addition, Highway 60, Highway 61, Highway 62, Highway 67 and Highway 412 cross through the region.

WORKFORCE DEMOGRAPHICS

The Southeast Region workforce has over 138,500 employees, making up 5 percent of Missouri employment. In this report, workforce is defined as a the average regional monthly employment according to the 2017 Quarterly Census of Employment and Wages.

The workforce is getting older in the Southeast Region, a trend occurring throughout Missouri and the U.S. In 2017, 23 percent of the workforce was age 55 or older, up from 18 percent a decade earlier.

Southeast Region Workforce Age

Source: US Census Bureau, LEHD, Annual Average 2016Q4 -2017Q3

In 2017, 53 percent of the workforce was female and 47 percent was male, which compares to a 51/49 spilt for Missouri. For the Region, 10 percent of the workforce was non-white, compared to 17 percent for the state; 2 percent was Hispanic or Latino, compared to 4 percent for Missouri.

For 3 percent of the region's population ages 18 to 64 the primary languages spoken at home is something other than English, compared to 6 percent for Missouri and 22 percent for the US. The Southeast Region has a higher percentage of the population with a disability compared to the state and nation. For the Region, 18 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.
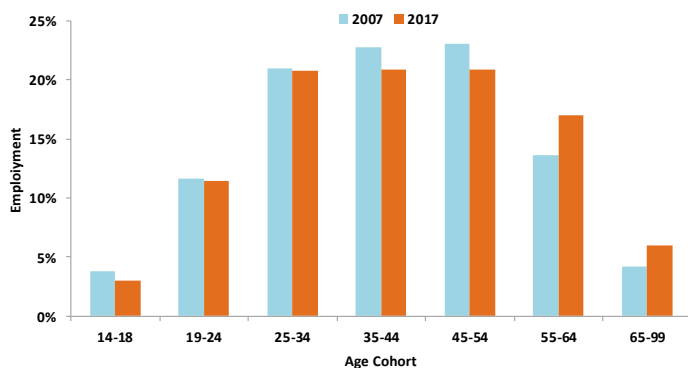
Educational attainment rates for the Southeast Region are below that of Missouri. Twenty-three percent of the region's population, age 25 and older, has an associates, bachelor's or advanced degree, compared to 35 percent for Missouri.
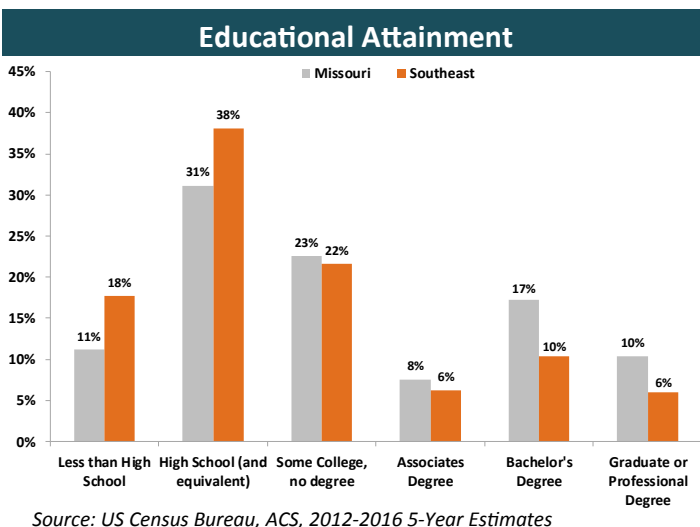
Educational Attainment

Source: US Census Bureau, ACS, 2012-2016 5-Year Estimates

INDUSTRY ANALYSIS

In 2017, employment in the Southeast Region was over 138,500. Employment fell 0.5 percent in the region from 2016 to 2017—Missouri employment grew 0.9 percent in that time. From 2012 to 2017, the region employment has a net change of near zero. Missouri employment, in that time, has grown an average 1.3 percent per year.

Employment Annual Growth Rate

Source: MERIC, QCEW, 2017 Annual Average
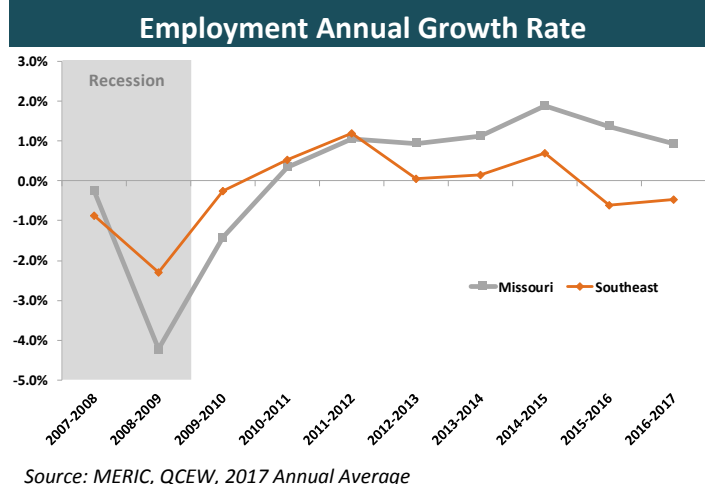
Health Care & Social Assistance is the largest employer in the region, representing 23 percent of all employment. It also was the leader in employment growth for the region in 2017, adding over 900 jobs. *Social Assistance* was the driver of employment growth within the industry sector, adding over 580 job (7 percent growth). *Nursing & Residential Care Facilities* employment grew 4 percent from 2016 to 2017—adding over 250 jobs to the region.

Hospitals had slight gains in employment in 2017, following four years of decline, while *Ambulatory Health Care* Services employment growth slowed to a near net zero change in 2017 after two years of strong employment growth.

Table 1: Southeast Region Top Industries by Employment					
Industry	**2011 Employment**	**2016 Employment**	**Net Change**	**2011-2016 Employment CAGR**	**2016 Average Annual Wages**
Health Care & Social Assistance	27,493	30,431	2,938	2%	$33,836
Retail Trade	17,677	18,521	844	1%	$24,083
Manufacturing	18,606	18,057	(549)	-1%	$44,901
Accommodation & Food Services	10,211	11,295	1,084	2%	$14,241
Educational Services	7,982	8,286	305	1%	$33,856
Public administration	7,219	7,112	(107)	0%	$32,639
Construction	6,080	6,238	158	1%	$44,096
Transportation & Warehousing	5,570	6,233	663	2%	$47,489
Wholesale Trade	5,665	5,577	(87)	0%	$46,642
Finance & Insurance	4,157	4,048	(110)	-1%	$41,359

Source: MERIC, QCEW, 2017 Annual Average

Manufacturing employment fell 4 percent for the second straight year, with declines happening throughout the industry sector.

Food Manufacturing, the largest manufacturing industry within the region, experienced employment decline in 2017, continuing a trend that started in 2013. *Plastic & Rubber Product Manufacturing* employment grew and has averaged 2 percent employment growth per year from 2012 to 2017. *Transportation Equipment Manufacturing, however,* had heavy employment loss in 2017.

Furniture & Related Product Manufacturing has averaged 9 percent employment growth per year from 2012 to 2017 and *Wood Product Manufacturing* employment has remained relatively even in that time.

Service sector industries, *Accommodation & Food Services* and *Administrative & Support Services,* had slight employment gains in 2017, growing 1 percent respectively. *Retail Trade* employment declined 1 percent in 2017, following three years of employment growth in the region.

Location Quotient

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient describes the concentration of an industry in a geographical region, in relation to the nation, with 1.0 being the national average.

The Southeast Region has high concentrations in advanced manufacturing, including *Plastics & Rubber Manufacturing*, *Paper Manufacturing*, *Furniture Manufacturing*, and *Wood Product Manufacturing*, among others. It also has a specialization in *Mining*, especially in the areas of crushed rock and quarrying.

Table 2: Southeast Region Location Quotients		
Industry	**Employment**	**Location Quotient**
Mining (except Oil & Gas)	997	5.8
Plastics & Rubber Products Mfg.	2,613	3.9
Paper Mfg.	1,247	3.6
Furniture & Related Product Mfg.	1,166	3.2
Wood Product Mfg.	1,098	3.0
Gasoline Stations	2,543	2.9
Crop Production	1,513	2.9
Nonmetallic Mineral Product Mfg.	1,056	2.8
Social Assistance	8,944	2.6
Food Mfg.	3,236	2.2
Truck Transportation	2,673	2.0
Primary Metal Mfg.	678	2.0
Nursing & Residential Care Facilities	5,829	1.9
Couriers & Messengers	1,042	1.7

Source: MERIC, QCEW, 2017 Annual Average

Largest Employers in Southeast Region

Top health care employers include **St. Francis Medical Center**, **Southeast Missouri Hospital** and **Missouri Delta Medical Center**.

Top employing food manufacturers include **Good Humor-Breyers**, **Tyson Chicken**, and **Gilster-Mary Lee**. Other top manufacturing employers are **T.G. Missouri Corp., Proctor & Gamble, US Tool Group** and **W.W. Wood Products**.

Southeast Missouri State University is a large public sector employer in the region.

LABOR MARKET ANALYSIS

Unemployment

The regional unemployment rate was 4.3 percent in June 2018, down from 4.9 percent in June 2017. The region's unemployment rate is historically higher than that of the rest of Missouri, and that trend continues into June of 2018. From June 2013 to June 2018, the unemployment rate dropped 3.8 percentage points.

Occupational Projections

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its **Now-Next-Later** categorization system to help job seekers understand the training, education and experience requirements for various occupations.

Now jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

Next jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates or some postsecondary education.

Later jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For **Now** occupations, *Personal Care Aides* and *Cashiers* will have the most openings. *Personal Care Aides* and *Home Health Aides* are projected to be the fastest growing **Now** occupations over the next decade.

Truck Drivers and *Nursing Assistants* will have the most openings for the **Next** category of occupations. Healthcare related positions, including *Physical Therapists*, *Respiratory Therapists*, and *Medical Assistants,* are the fastest growing **Next** occupations.

For **Later** occupations, *Registered Nurses*, *General & Operations Managers*, and *K12 Teachers* will have the most openings. Health Care professions, including *Nurse Practitioners, Physical Therapists,* and *Healthcare Social Workers,* are the fastest growing **Later** occupations.

Occupation	2016 Estimated Employment	2026 Projected Employment	Growth Openings	Replacement Openings	Total Openings	Median Wages	
NOW							
Personal Care Aides	6,943	9,920	2,977	11,798	**14,775**	$19,829	🔥
Cashiers	5,594	5,709	115	10,484	**10,599**	$18,745	🔥
Food Prep. & Serving Workers	4,106	4,642	536	7,924	**8,460**	$18,417	🔥
Retail Salespersons	4,325	4,393	68	6,219	**6,287**	$22,901	🔥
Secretaries and Administrative Assistants	4,589	4,189	-400	4,664	**4,264**	$27,992	
NEXT							
Heavy and Tractor-Trailer Truck Drivers	3,707	3,700	-7	3,897	**3,890**	$36,938	🔥
Nursing Assistants	2,624	2,939	315	3,096	**3,411**	$21,975	🔥
Retail Sales Supervisor	1,923	2,003	80	2,046	**2,126**	$34,317	🔥
Cooks, Restaurant	1,370	1,465	95	1,965	**2,060**	$20,110	🔥
Bookkeeping & Accounting Clerks	1,752	1,705	-47	1,901	**1,854**	$29,225	
LATER							
Registered Nurses	3,536	4,003	467	1,898	**2,365**	$55,827	🔥
General and Operations Managers	2,083	2,247	164	1,740	**1,904**	$67,167	🔥
Secondary School Teachers	2,373	2,437	64	1,634	**1,698**	$45,651	
Elementary School Teachers	1,027	1,055	28	729	**757**	$45,126	
Accountants and Auditors	719	804	85	663	**748**	$52,119	

Table 3: Southeast Region Long-Term Occupational Projections

🔥 denotes occupations within the top ten for on-line job ads in 2017 in the region within the respective Now-Next-Later classification.

Source: MERIC Occupational Projections, 2016-2026

Table 4: Southeast Region
Fastest Growing Occupations

NOW

Personal Care Aides

Home Health Aides

Veterinary Assistants

Helpers--Production Workers

Medical Secretaries

NEXT

Physical Therapist Assistants

Respiratory Therapists

Medical Assistants

Supervisors of Personal Service Workers

Preschool Teachers

LATER

Nurse Practitioners

Physical Therapists

Healthcare Social Workers

Market Research Analysts and Marketing Specialists

Medical and Health Services Managers

Note: Occupations with net increase of less than 30 are omitted.

Source: MERIC Occupational Projections, 2016-2026

Southwest Region

T he Southwest Region is comprised of seven counties in the southwest corner of Missouri. This region is home to several cities including Joplin and Monett.

Many of Missouri's major highways cross through this region. Interstate 44 runs east/west through the center of the region. In addition, Highway 60, Highway 160 and Highway 71 cross through the region.

WORKFORCE DEMOGRAPHICS

T he Southwest Region workforce has over 112,600 employees, making up 4 percent of the Missouri workforce. In this report, workforce is defined as a the average regional monthly employment according to the 2017 Quarterly Census of Employment and Wages.
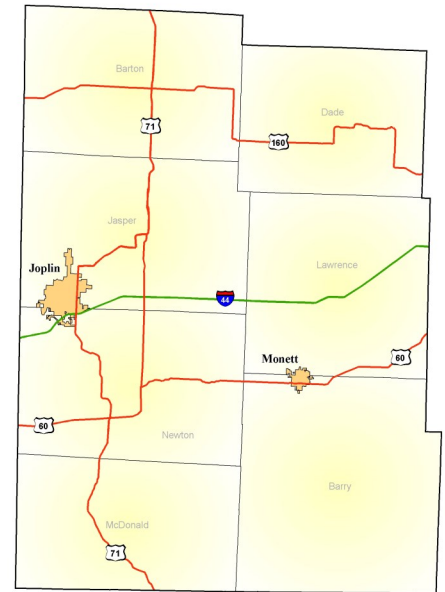
The workforce is getting older in the Southwest Region, a trend happening throughout Missouri and the U.S. In the Southwest Region, 23 percent of the workforce was age 55 and older, up from 18 percent a decade earlier.
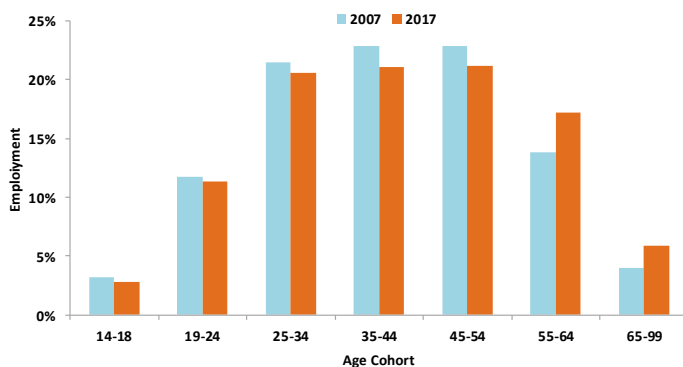
Source: US Census Bureau, LEHD, Annual Average 2016Q4 -2017Q3

In 2017, 48 percent of the workforce was female and 52 percent was male, which compares to a 51/49 split for female and male workers in Missouri. For the Region, 9 percent of the workforce was non-white, compared to 17 percent for the state; 7 percent was Hispanic or Latino, compared to 4 percent for Missouri.

For 8 percent of the region's population ages 18 to 64 the primary language spoken at home is something other than English, compared to 6 percent for Missouri and 22 percent for the US. Thirteen percent of the population has a disability matching the state and higher than the U.S. with 10 percent .

Educational attainment rates for the Southwest Region are below that of Missouri. Twenty-five percent of the region's population, age 25 and older, has an associates, bachelor's or advanced degree, compared to 35 percent for the state.

Educational Attainment
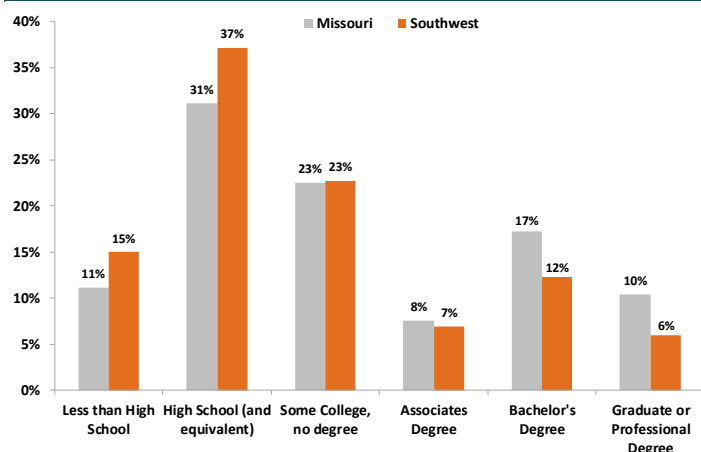
Source: US Census Bureau, ACS, 2012-2016 5-Year Estimates

Employment Annual Growth Rate

Source: MERIC, QCEW, 2017 Annual Average

INDUSTRY ANALYSIS

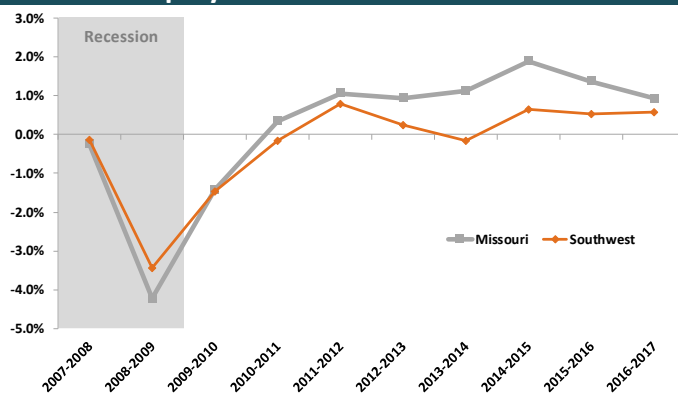In 2017, employment in the Southwest region was over 112,600. Employment in the region rose 0.6 percent, adding 650 jobs. Missouri employment grew 0.9 percent in that time. From 2012 to 2017, the Southwest Region averaged 0.4 percent employment growth, compared to 1.3 percent for Missouri.

Manufacturing is the largest employing industry sector in the region representing 20 percent of all employment. *Manufacturing* employment grew 2 percent from 2016 to 2017, adding over 400 jobs to the region.

Forty percent of all manufacturing jobs are within *Food Manufacturing* in the Southwest region. *Food Manufacturing* employment grew 5 percent in 2017. Employment within the industry has averaged 1 percent growth per year from 2012 to 2017.

Fabricated Metal Manufacturing, also a major employer in the region, grew for the fourth consecutive year, and has averaged 2 percent growth from 2012 to 2017. E*lectrical Equipment & Appliance Manufacturing*, *Transportation Equipment Manufacturing*, and *Primary Metal Manufacturing* had declining employment from 2012 to 2017 in the Southwest region.

Table 1: Southwest Region Top Industries by Employment

Industry	2012 Employment	2017 Employment	Net Change	2012-2017 Employment CAGR	2017 Average Annual Wages
Manufacturing	22,721	22,793	71	0.1%	$44,305
Health Care and Social Assistance	15,541	16,540	998	1.3%	$40,688
Retail Trade	14,391	14,998	607	0.8%	$25,767
Accommodation and Food Services	8,540	9,052	512	1.2%	$14,060
Educational Services	8,850	8,940	91	0.2%	$34,909
Transportation and Warehousing	7,728	7,705	(23)	-0.1%	$48,431
Admin and Support and Waste Management	5,393	5,357	(36)	-0.1%	$25,198
Construction	4,097	4,523	426	2.0%	$44,474
Wholesale Trade	4,061	3,949	(112)	-0.6%	$42,613
Professional, Scientific, and Technical Services	2,926	3,438	512	3.3%	$56,628

Source: MERIC, QCEW, 2017 Annual Average

Employment in *Transportation & Warehousing,* an industry often built up in support of manufacturing, grew 3 percent in 2017. *Truck Transportation* added 90 jobs in 2017, although it lost 500 jobs from 2012 to 2016. *Warehousing & Storage* grew 6 percent in 2017 and has averaged 6 percent growth from 2012 to 2017.

Health Care & Social Assistance, the second largest employing industry sector in the region, added 230 jobs in 2017. Most of the growth within this industry sector is attributed to *Social Assistance*, which had 7 percent employment growth in each of the past two years.

Service industries including *Retail Trade*, *Accommodation & Food Services*, and *Administrative & Support Services* had declining employment in 2017. *Professional, Scientific, & Technical Services* employment grew 4 percent, and has averaged 3 percent growth per year from 2012 to 2017 in the region.

Location Quotient

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient describes the concentration of an industry in a geographical region, in relation to the nation, with 1.0 being the national average.

Largest Employers in Southwest Region

Top Health Care employers include **Freeman Health System** and **Mercy Hospital**.

Top employing food manufacturers include **Tyson**, **Simmons Foods**, **George's Processing** and **Butterball**. Other major manufacturers include **EFCO Corp**, **La-Z-Boy**, and **Leggett & Platt**. **Jack Henry & Associates** is a major employer in the Computer Systems Design field.

Missouri Southern State University is a major public sector employer in the region.

The Southwest Region has high concentrations in manufacturing, including: *Food, Furniture, Electrical Equipment & Appliance,* and *Fabricated Metal Product Manufacturing*. It also has high concentrations in *Animal Production* and *Truck Transportation*.

Table 2: Southwest Region Location Quotients		
Industry	**Employment**	**Location Quotient**
Food Mfg.	9,124	7.2
Animal Production	1,033	4.9
Truck Transportation	5,236	4.5
Furniture & Related Product Mfg.	1,302	4.2
Electrical Equip., & Appliance Mfg.	1,235	4.0
Fabricated Metal Product Mfg.	3,524	3.1
Primary Metal Mfg.	894	3.0
Gasoline Stations	1,885	2.5
Paper Mfg.	631	2.2
General Merchandise Stores	4,661	1.9
Miscellaneous Mfg.	754	1.6
Electronics & Appliance Stores	597	1.5

Source: MERIC, QCEW, 2017 Annual Average

LABOR MARKET ANALYSIS

Unemployment

The regional unemployment rate was 3.3 percent in June 2018, down from 3.8 percent in June 2017. This mirrors state and national trends, representing a tight labor market—which means there are less workers looking for employment and employers are having to compete more for the labor that is available. It also means that some employers may have a hard time finding qualified employees for some positions. From June 2013 to June 2018, the unemployment rate dropped 3.5 percentage points.

Occupational Projections

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its ***Now-Next-Later*** categorization system to help job seekers understand the

training, education and experience requirements for various occupations.

Now jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

Next jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates or some postsecondary education.

Later jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For **Now** occupations, *Cashiers*, *Food Service* Workers, and *Retail Salespersons* lead the way in total openings. *Veterinary Assistants*, *Refuse & Recyclable Material Collectors*, *Home Health Aides,* and *Personal Care Aides* projected to be the fastest growing **Now** occupations over the next decade.

Truck Drivers, *Retail Sales Supervisors*, and *Nursing Assistants* will have the most openings for the **Next** category of occupations. *Computer User Support Specialists* and *HVAC & Refrigeration Mechanics & Installers* are the fastest growing **Next** occupations.

For **Later** occupations, *Registered Nurses*, *General & Operations Managers*, and *K12 Teachers* will be have the most openings. *Software Developers* and *Veterinarians* are the fastest growing **Later** occupations.

Table 3: Southwest Region Long-Term Occupational Projections						
Occupation	**2016 Estimated Employment**	**2026 Projected Employment**	**Growth Openings**	**Replacement Openings**	**Total Openings**	**Median Wages**
NOW						
Cashiers	3,702	3,609	-93	6,782	**6,689**	$18,663 🔥
Food Prep. & Serving Workers	3,206	3,482	276	6,058	**6,334**	$18,662 🔥
Retail Salespersons	3,810	3,990	180	5,564	**5,744**	$21,962 🔥
Laborers & Material Movers	2,829	3,148	319	4,036	**4,355**	$25,196 🔥
Personal Care Aides	1,679	2,178	499	2,698	**3,197**	$18,846
NEXT						
Heavy and Tractor-Trailer Truck Drivers	5,295	5,174	-121	5,507	**5,386**	$39,007 🔥
Retail Sales Supervisor	1,694	1,762	68	1,801	**1,869**	$36,890 🔥
Nursing Assistants	1,461	1,487	26	1,640	**1,666**	$22,820 🔥
Bookkeeping & Accounting Clerks	1,247	1,278	31	1,389	**1,420**	$30,328
Food Prep. & Serving Workers Supervisors	897	915	18	1,270	**1,288**	$26,222
LATER						
Registered Nurses	2,715	2,863	148	1,404	**1,552**	$54,057 🔥
General and Operations Managers	1,432	1,562	130	1,203	**1,333**	$68,003 🔥
Elementary School Teachers	1,327	1,476	149	981	**1,130**	$45,380
Secondary School Teachers	1,241	1,379	138	890	**1,028**	$44,139
Middle School Teachers	854	951	97	632	**729**	$44,142

🔥 *denotes occupations within the top ten for on-line job ads in 2017 in the region within the respective Now-Next-Later classification.*

Source: MERIC Occupational Projections, 2016-2026

Table 4: Southwest Region Fastest Growing Occupations

NOW

Veterinary Assistants

Refuse and Recyclable Material Collectors

Home Health Aides

Personal Care Aides

Loan Interviewers and Clerks

NEXT

Computer User Support Specialists

Heating, A.C., and Refrigeration Mechanics

Property & Real Estate Managers

Plumbers, Pipefitters, and Steamfitters

Supervisors of Laborers and Material Movers

LATER

Software Developers, Applications

Veterinarians

Financial Managers

Market Research Analysts and Marketing Specialists

Nurse Practitioners

Note: Occupations with net increase of less than 30 are omitted.

Source: MERIC Occupational Projections, 2016-2026

St. Louis Region

T he St. Louis Region is comprised of five counties and is located in the east central part of Missouri. The region is home to several cities and the St. Louis metropolitan statistical area including Arnold, Washington, St. Charles, St. Peters, Florissant, O'Fallon, Chesterfield, and the City of St. Louis.

As a large metropolitan area, many of Missouri's major roads cross through the region, including interstate 70, Interstate 44, Interstate 55 and Interstate 64. In addition, Highway 50, Highway 40, Highway 61 and Highway 67 cross through the region.

WORKFORCE DEMOGRAPHICS

T he St. Louis Region workforce has over 1,065,000 employees, making up 39 percent of Missouri employment. In this report, workforce is defined as a the average regional monthly employment according to the 2017 Quarterly Census of Employment and Wages.

The workforce is getting older in the St. Louis Region, a trend occurring throughout Missouri and the U.S. In 2017, 23 percent of the workforce was age 55 or older, up from 16 percent a decade earlier.

St. Louis Region Workforce Age

Source: US Census Bureau, LEHD, Annual Average 2016Q4 -2017Q3

In 2017, 50 percent of the workforce was female and 50 percent was male, compared to the 51/49 split in the total Missouri workforce. In the region, 23 percent of the workforce is non-white, compared to 17 percent for the state; 3 percent was Hispanic or Latino, compared to 4 percent for Missouri.

For 8 percent of the region's population ages 18 to 64 the language spoken at home is something other than English, compared to 6 percent for Missouri and 22 percent for the U.S. The St. Louis Region has a lower percentage of the population with a disability compared to the state and nation. Regionally, 10 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the US.
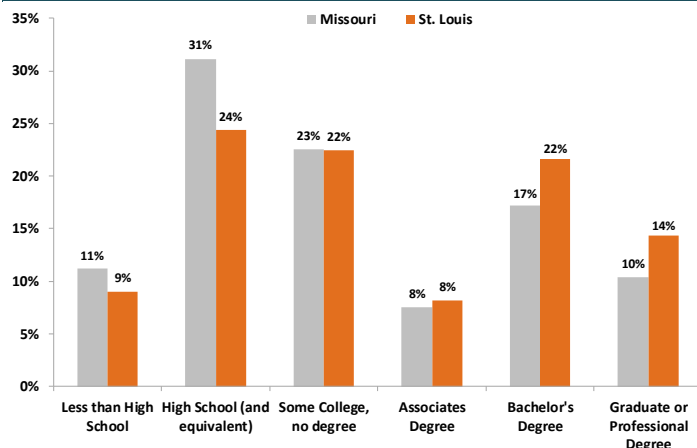
Educational attainment rates for the St. Louis Region are ahead of those for the entire state. Forty-four percent of
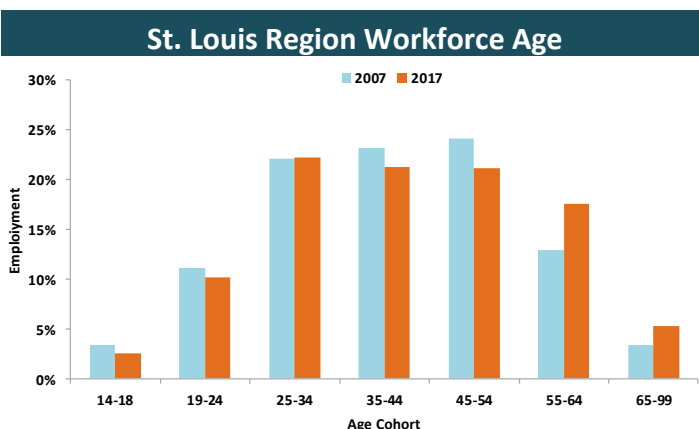
the region's population has an associates, bachelor's or advanced degree compared to 35 for the state.

Educational Attainment

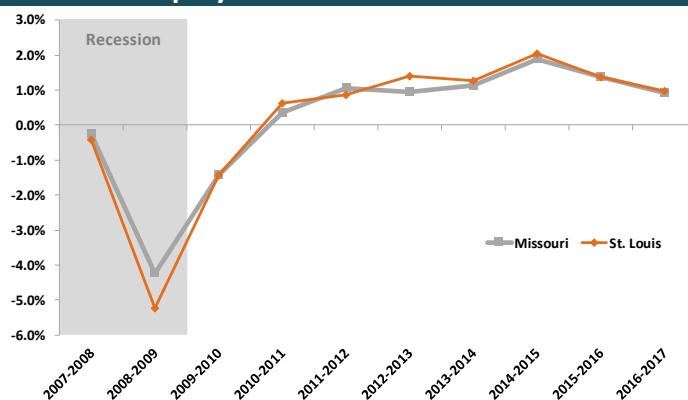*Source: US Census Bureau, ACS, 2012-2016 5-Year Estimates*

Employment Annual Growth Rate

Source: MERIC, QCEW, 2017 Annual Average

INDUSTRY ANALYSIS

In 2017, employment in the St. Louis Region was over 1,065,000. Employment in the region grew 1.0 percent from 2016 to 2017, adding 10,250 new jobs. Missouri employment grew 0.9 percent in that time. From 2012 to 2017, the region averaged 1.4 percent employment growth per year, compared to 1.3 percent for the state.

Health Care & Social Services is the largest employing industry within the region, representing 17 percent of all employment. Employment within the industry sector has grown at least 3 percent in each of the past three years. *Social Assistance* has been the largest contributor to employment growth within the industry sector, adding 2,500 new jobs in 2017 (7 percent growth). *Ambulatory Health Care Services, Hospitals,* and *Nursing & Residential Care Facilities* employment each grew 2 percent in 2017, respectively.

Manufacturing employment has grown each year from 2012 to 2017, averaging 2 percent annual growth. *Transportation Equipment Manufacturing*, the largest manufacturing industry in the region, had slight employment decline from 2015 to 2017, which followed three years of substantial employment growth.

Table 1: St. Louis Top Industries by Employment					
Industry	2011 Employment	2016 Employment	Net Change	2011-2016 Employment CAGR	2016 Average Annual Wages
Health Care & Social Assistance	157,274	179,133	21,859	3%	$49,749
Retail Trade	104,835	109,217	4,382	1%	$30,283
Accommodation & Food Services	88,736	101,118	12,381	3%	$18,312
Manufacturing	85,141	92,452	7,311	2%	$68,898
Admin & Support Services	63,542	68,734	5,192	2%	$39,470
Educational Services	64,676	65,584	908	0%	$46,591
Professional, Scientific, & Technical Services	57,175	64,017	6,843	2%	$76,692
Finance & Insurance	52,058	55,329	3,270	1%	$77,374
Construction	47,320	53,528	6,208	2%	$61,614
Wholesale Trade	44,152	46,159	2,007	1%	$69,376

Source: MERIC, QCEW, 2017 Annual Average

Machinery Manufacturing employment grew slightly in 2017, continuing a trend of slow, even growth from 2013 to 2017. *Chemical Manufacturing* employment grew over 5 percent in each of 2016 and 2017, adding over 1,100 jobs to the region.

Professional, Scientific & Technical Services grew 2 percent in 2017, adding nearly 1,500 jobs. This industry sector has seen employment growth of at least 2 percent for each year from 2013 to 2017. *Finance & Insurance* grew 3 percent in 2017, adding 1,800 jobs.

Retail Trade had low levels of employment decline in 2017, after three years of employment growth. *Accommodation & Food Services* grew 2 percent in 2017, continuing a trend of annual employment growth of 1,000 jobs or more since 2012. *Accommodation* was the driver of employment growth within the industry sector in 2017.

Location Quotient

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient describes the concentration of an industry in a geographical region, in relation to the nation, with 1.0 being the national average.

Table 2: St. Louis Region Location Quotients		
Industry	Employment	Location Quotient
Data Processing & Hosting	5,832	2.4
Management of Companies	39,447	2.2
Chemical Mfg.	11,416	1.8
Beverage & Tobacco Product Mfg.	3,602	1.8
Transportation Equip. Mfg.	21,718	1.7
Hospitals	64,640	1.7
Securities & Commodity Contracts	11,775	1.6
Telecommunications	9,057	1.5
Machinery Mfg.	11,701	1.4
Broadcasting (except Internet)	2,895	1.4
Printing & Related Support Activities	4,623	1.4

Source: MERIC, QCEW, 2017 Annual Average

Largest Employers in the St. Louis Region

Top employers within health care include **Barnes-Jewish Hospital**, **St. Mary's Hospital**, **Mercy Hospital, St. Louis Children's Hospital,** and **St. Luke's Hospital.**

Headquarters operations such as **Anheuser-Busch**, **Monsanto, Express Scripts**, and **Enterprise,** manufacturers **General Motors**, **Boeing** and **Nestle Purina**, and financial services providers **Edward Jones** and **Wells Fargo** rank among the top employers in their respective industry sectors.

St. Louis University, Washington University and the **University of Missouri, St. Louis** are also major employers in the region.

The St. Louis Region has high concentrations in *Data Processing & Hosting* and *Management of Companies*. It also has high concentrations within manufacturing, including *Chemical Manufacturing*, *Beverage Manufacturing* and *Transportation Equipment Manufacturing.*

LABOR MARKET ANALYSIS

Unemployment

The regional unemployment rate was 3.3 percent in June 2018, slightly down from 3.6 percent in June 2017. This mirrors state and national trends, representing a tight labor market—which means there are less workers looking for employment and employers are having to compete more for the labor that is available. It also means that some employers may have a hard time finding qualified employees for some positions. From June 2013 to June 2018, the unemployment rate dropped 3.6 percentage points.

Occupational Projections

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its **Now-Next-Later** categorization system to help job seekers understand the training, education and experience requirements for various occupations.

Now jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

Next jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates or some postsecondary education.

Later jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For **Now** occupations, front-line service positions lead the way in total openings, including *Food Service Workers*, *Cashiers*, *Retail Salespersons*, and *Waiters/Waitresses*. *Personal Care* Aides and *Home Health Aides* are projected to be the fastest growing **Now** occupations over the next decade.

Nursing Assistants and *Cooks* will have the most openings for the **Next** category of occupations. Healthcare occupations, including *Respiratory Therapist, Physical Therapist Assistants, Diagnostic Medical Sonographers, Phlebotomists,* and *Occupational Therapy Assistants* are the fastest growing **Next** occupations.

For **Later** occupations, *Registered Nurses*, *General & Operations Managers*, and *Accountants* will have the most openings. *Information Security Analysts*, *Physician Assistants,* and *Nurse Practitioners* are the fastest growing **Later** occupations.

Table 3: St. Louis Region Long-Term Occupational Projections							
Occupation	2016 Estimated Employment	2026 Projected Employment	Growth Openings	Replacement Openings	Total Openings	Median Wages	
NOW							
Food Prep. & Serving Workers	28,387	32,764	4,377	55,391	**59,768**	$18,865	🔥
Cashiers	24,607	24,451	-156	45,506	**45,350**	$21,120	🔥
Retail Salespersons	30,188	29,238	-950	42,391	**41,441**	$23,184	🔥
Waiters and Waitresses	21,079	21,877	798	40,256	**41,054**	$19,041	
Personal Care Aides	19,093	26,401	7,308	31,829	**39,137**	$22,219	
NEXT							
Nursing Assistants	15,869	18,244	2,375	18,982	**21,357**	$25,695	🔥
Cooks, Restaurant	11,171	12,163	992	16,170	**17,162**	$23,651	🔥
Bookkeeping & Accounting Clerks	12,879	12,437	-442	13,920	**13,478**	$39,553	🔥
Food Prep. & Serving Workers Supervisors	8,689	9,364	675	12,656	**13,331**	$28,875	
Retail Sales Supervisor	11,152	11,308	156	11,702	**11,858**	$40,880	🔥
LATER							
Registered Nurses	33,616	39,328	5,712	18,371	**24,083**	$62,749	🔥
General and Operations Managers	16,754	18,003	1,249	13,969	**15,218**	$104,336	
Accountants and Auditors	11,693	12,539	846	10,549	**11,395**	$70,133	🔥
Elementary School Teachers	8,780	9,449	669	6,382	**7,051**	$52,527	
Business Operations Specialists	7,041	7,534	493	6,490	**6,983**	$71,729	

🔥 *denotes occupations within the top ten for on-line job ads in 2017 in the region within the respective Now-Next-Later classification.*

Source: MERIC Occupational Projections, 2016-2026

Table 4: St. Louis Region Fastest Growing Occupations
NOW
Personal Care Aides
Home Health Aides
Medical Secretaries
Brokerage Clerks
Helpers--Production Workers
NEXT
Respiratory Therapists
Physical Therapist Assistants
Diagnostic Medical Sonographers
Phlebotomists
Occupational Therapy Assistants
LATER
Information Security Analysts
Physician Assistants
Nurse Practitioners
Statisticians
Health Specialties Teachers, Postsecondary

Note: Occupations with net increase of less than 75 are omitted.

Source: MERIC Occupational Projections, 2016-2026

West Central Region

The West Central Region is comprised of 13 counties in the west central part of Missouri. This region is home to cities including Warrensburg, Sedalia, Lexington, Clinton, and Nevada.

Many of Missouri's major highways cross through the region. Interstate 70 runs through the northern part of the region. In addition, Highway 50, Highway 54 and Highway 24 cross east/west through the region, while Highway 65 and Highway 71 run north/south.

WORKFORCE DEMOGRAPHICS

The West Central Region workforce has over 84,000 employees, making up 3 percent of Missouri employment. In this report, workforce is defined as a the average regional monthly employment according to the 2017 Quarterly Census of Employment and Wages.

The workforce is getting older in the West Central Region, a trend occurring throughout Missouri and the U.S. In the West Central region 25 percent of the workforce was age 55 or older, up from 19 percent a decade earlier.

In 2017, 53 percent of the workforce was female and 47 percent was male, which compares to a 51/49 split for Missouri. For the region, 7 percent of the workforce was non-white; compared to 17 percent for the state; 4 percent was Hispanic or Latino, which matches Missouri.

For 5 percent of the region's population ages 18 to 64 the primary language spoken at home is something other than English, compared to 6 percent for Missouri and 22 percent for the U.S. The West Central Region has a higher percentage of the population with a disability compared to the state and nation. For the region, 16 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the US.

Educational attainment rates for the West Central Region are behind those of the entire state. Twenty-five percent
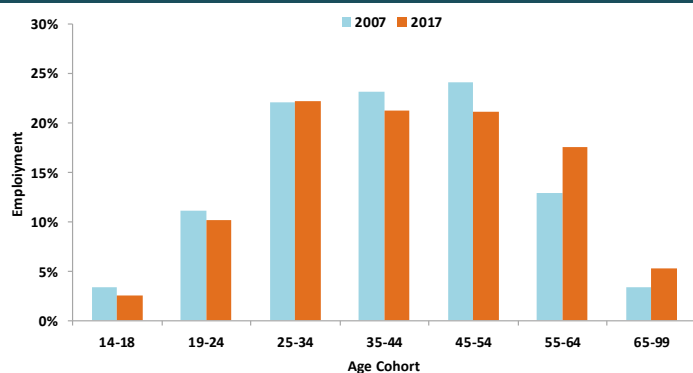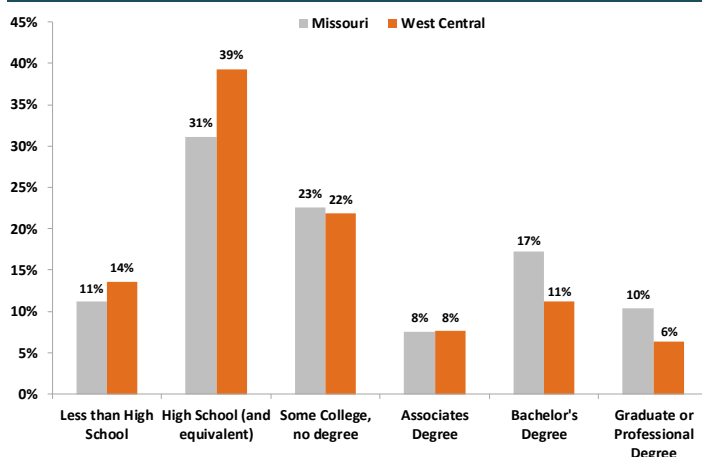

Source: US Census Bureau, LEHD, Annual Average 2016Q4 -2017Q3

of the region's population has an associates, bachelor's or advanced degree, compared to 35 percent for the state.

Educational Attainment

Source: US Census Bureau, ACS, 2012-2016 5-Year Estimates

INDUSTRY ANALYSIS

In 2017, employment in the West Central Region was 84,100. Employment in the region rose 0.2 percent from 2016 to 2017, adding nearly 200 jobs. Missouri employment grew 0.9 percent from 2016 to 2017. From 2012 to 2017, the region averaged 0.5 percent annual employment growth, compared to 0.9 percent for Missouri.
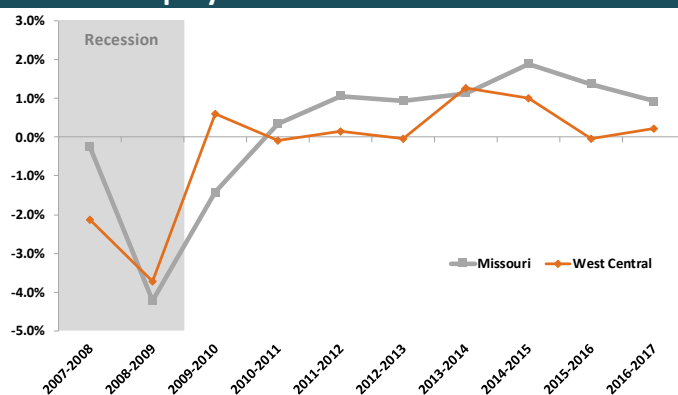
Employment Annual Growth Rate

Source: MERIC, QCEW, 2017 Annual Average

Health Care & Social Assistance is the largest employing industry sector in the region, representing 19 percent of all employment. *Health Care & Social Assistance* employment grew 2 percent in 2017, adding 380 new jobs to the region. That growth was driven by *Hospitals* (5 percent growth) and *Nursing & Residential Care Facilities* (2 percent growth).

Manufacturing is the second largest employer in the region and one of the main economic engines. Manufacturing employment added 325 jobs (3 percent growth) in 2017. Employment within the industry sector is relatively unchanged from 2012 to 2017, adding a net 50 jobs in that time.

Table 1: West Central Region Top Industries by Employment

Industry	2012 Employment	2017 Employment	Net Change	2012-2017 Employment CAGR	2017 Average Annual Wages
Health Care and Social Assistance	15,377	16,305	927	1.2%	$32,226
Manufacturing	11,610	11,857	247	0.4%	$43,469
Retail Trade	10,841	11,145	304	0.6%	$24,621
Educational Services	9,924	9,874	(50)	-0.1%	$35,970
Accommodation and Food Services	7,126	7,386	260	0.7%	$12,919
Public administration	5,044	5,017	(27)	-0.1%	$35,666
Construction	3,077	3,395	318	2.0%	$40,861
Finance and Insurance	2,587	2,734	148	1.1%	$48,199
Wholesale Trade	2,399	2,659	260	2.1%	$42,294
Transportation and Warehousing	2,477	2,599	122	1.0%	$38,268

Source: MERIC, QCEW, 2017 Annual Average

Food Manufacturing employment rose 2 percent in 2017 after three years of declining employment. *Fabricated Metal Product Manufacturing* employment grew, while *Machinery Manufacturing* and *Transportation Equipment Manufacturing* employment levels remained relatively flat.

Service industries *Retail Trade* and *Accommodation & Food Services* had little change in total employment in 2017. After adding 400 total jobs in 2015 and 2016, *Retail* employment fell 50 jobs. *Accommodation & Food Services* added about 50 jobs in 2017. The employment growth within *Accommodation & Food Services* is all attributed to growth within *Food Services & Drinking Places*. From 2013 to 2017, *Food Services & Drinking Places* added 600 new jobs to the economy.

Location Quotient

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average.

The West Central Region is concentrated in industries related to agriculture, including *Food Manufacturing*, *Animal Production*, and *Support Activities for Agriculture*. It also has specializations in Advanced Manufacturing, such as *Electrical & Appliance Manufacturing*, *Machinery Manufacturing*, and *Fabricated Metal Product Manufacturing.*

Table 2: West Central Region Location Quotients		
Industry	**Employment**	**Location Quotient**
Food Mfg.	3,671	4.5
Animal Production	568	4.3
Gasoline Stations	1,879	4.0
Electrical Equip., & Appliance Mfg.	767	3.9
Support Activities for Agriculture & Forestry	639	3.3
Primary Metal Mfg.	599	3.2
Machinery Mfg.	1,414	2.6
Nursing & Residential Care Facilities	4,219	2.5
Fabricated Metal Product Mfg.	1,734	2.4
Nonmetallic Mineral Product Mfg.	441	2.1
Transit & Ground Passenger Transportation	512	2.1
Chemical Mfg.	843	2.0

Source: MERIC, QCEW, 2017 Annual Average

LABOR MARKET ANALYSIS

Unemployment

The regional unemployment rate was 4.4 percent in June 2018. The unemployment rate has stayed at that 4.4 percent over the past year. The unemployment rate in the region is higher than that of Missouri and the U.S. Also, the state and national unemployment rates have continued to fall over the last year in contrast to the region's unchanged rate. From June 2013 to June 2018, the unemployment rate dropped 3.1 percentage points.

Occupational Projections

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its ***Now-Next-Later*** categorization system to help job seekers understand the training, education and experience requirements for various occupations.

Largest Employers in the West Central Region

Top Health Care employers include **Bothwell Regional Health Center**, **Fitzgibbon Hospital, Golden Valley Memorial Hospital,** and **Western Missouri Medical Center**.

Top employing food manufacturers include **Tyson** and **ConAgra Foods**. Other major manufacturers include **Enersys Energy Products**, **Maxion Wheels**, **Waterloo Industries**, and **3M Company**.

Large public sector employers include **Whiteman Air Force Base**, the **University of Central Missouri** and **State Fair Community College**

Now jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

Next jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates or some postsecondary education.

Later jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For *Now* occupations *Cashiers*, *Food Service Workers*, and *Personal Care Aides* lead the way in total openings. *Personal Care Aides* and *Welders, Cutters, Solderers & Brazers* are projected to be the fastest growing *Now* occupations over the next decade.

Nursing Assistants, *Truck Drivers*, and *Retail Sales Supervisors* will have the most openings for the *Next* category of occupations. *Medical Assistants*, *Machinists*, *Automotive Service Technicians & Mechanics*, and *EMTs & Paramedics* are the fastest growing *Next* occupations.

For *Later* occupations, *K12 Teachers, General & Operations Managers*, and *Registered Nurses* will have the most openings. *Accountants*, various types of *Manager* positions, and *Registered Nurses* are the fastest growing *Later* occupations.

Table 3: West Central Region Long-Term Occupational Projections							
Occupation	**2016 Estimated Employment**	**2026 Projected Employment**	**Growth Openings**	**Replacement Openings**	**Total Openings**	**Median Wages**	
NOW							
Cashiers	3,217	3,493	276	6,224	**6,500**	$18,540	🔥
Food Prep. & Serving Workers	2,395	2,588	193	4,513	**4,706**	$18,264	🔥
Personal Care Aides	2,263	2,857	594	3,582	**4,176**	$20,532	
Retail Salespersons	2,228	2,311	83	3,238	**3,321**	$21,956	🔥
Secretaries and Administrative Assistants	3,013	2,779	-234	3,078	**2,844**	$28,456	
NEXT							
Nursing Assistants	2,098	2,220	122	2,403	**2,525**	$20,110	🔥
Heavy and Tractor-Trailer Truck Drivers	1,397	1,416	19	1,480	**1,499**	$34,464	🔥
Retail Sales Supervisor	1,254	1,345	91	1,354	**1,445**	$35,310	🔥
Bookkeeping & Accounting Clerks	889	838	-51	950	**899**	$30,276	
Cooks, Restaurant	591	611	20	833	**853**	$20,785	🔥
LATER							
Elementary School Teachers	1,320	1,409	89	955	**1,044**	$42,286	
Secondary School Teachers	1,238	1,319	81	869	**950**	$45,482	
General and Operations Managers	1,006	1,095	89	845	**934**	$61,657	
Registered Nurses	1,483	1,629	146	783	**929**	$55,707	🔥
Education Administrators, K12	591	634	43	451	**494**	$93,619	

🔥 *denotes occupations within the top ten for on-line job ads in 2017 in the region within the respective Now-Next-Later classification.*

Source: MERIC Occupational Projections, 2016-2026

Table 4: West Central Region Fastest Growing Occupations
NOW
Personal Care Aides
Welders, Cutters, Solderers, and Brazers
Insurance Sales Agents
Nonfarm Animal Caretakers
Pharmacy Technicians
NEXT
Medical Assistants
Machinists
Automotive Service Technicians and Mechanics
Emergency Medical Technicians and Paramedics
Industrial Machinery Mechanics
LATER
Accountants and Auditors
Managers, All Other
Registered Nurses
General and Operations Managers
Education Administrators, K12

Note: Occupations with net increase of less than 30 are omitted.

Source: MERIC Occupational Projections, 2016-2026

Source: MERIC Occupational Projections

Data Sources

Gross Domestic Product

U.S. Bureau of Economic Analysis. Regional Economic Accounts Data: Interactive Tables, Quarterly GDP by State, real GDP in chained dollars. http://www.bea.gov/regional/index.htm

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Civilian Labor Force

U.S. Census Bureau. Current Population Survey, CPS Table Creator. http://www.census.gov/cps/data/cpstablecreator.html

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U.S. Census Bureau. American Community Survey (ACS), 2016-2016 Five-Year Estimates. Disability Characteristics. Table S1810. http://factfinder.census.gov

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Infogroup© Largest Employers from InfoUSA database. https://www.infousa.com/

Labor Market Analysis

MERIC in cooperation with the U.S. Bureau of Labor Statistics. Local Area Unemployment Statistics (LAUS). Data not seasonally adjusted. https://www.missourieconomy.org/indicators/laus/default.aspx

MERIC in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics. Occupational Employment Projections. https://www.missourieconomy.org/occupations/occ_proj.stm

Appendix I

Missouri Workforce Development Regions by County				
Central	**Kansas City**	**Northeast**	**Northwest**	**Ozark**
Audrain	Cass	Adair	Andrew	Christian
Boone	Clay	Clark	Atchison	Dallas
Callaway	Jackson	Knox	Buchanan	Greene
Camden	Platte	Lewis	Caldwell	Polk
Cole	Ray	Lincoln	Clinton	Stone
Cooper		Macon	Daviess	Taney
Crawford		Marion	Dekalb	Webster
Dent		Monroe	Gentry	
Gasconade		Montgomery	Grundy	
Howard		Pike	Harrison	
Laclede		Ralls	Holt	
Maries		Randolph	Linn	
Miller		Schuyler	Livingston	
Moniteau		Scotland	Mercer	
Morgan		Shelby	Nodaway	
Osage		Warren	Putnam	
Phelps			Sullivan	
Pulaski			Worth	
Washington				
St. Louis	**Southeast**	**Southwest**	**South Central**	**West Central**
Franklin	Bollinger	Barry	Butler	Bates
Jefferson	Cape Girardeau	Barton	Carter	Benton
St. Charles	Dunklin	Dade	Douglas	Carroll
St. Louis	Iron	Jasper	Howell	Cedar
St. Louis City	Madison	Lawrence	Oregon	Chariton
	Mississippi	McDonald	Ozark	Henry
	New Madrid	Newton	Reynolds	Hickory
	Pemiscot		Ripley	Johnson
	Perry		Shannon	Lafayette
	Ste. Genevieve		Texas	Pettis
	St. Francois		Wayne	St. Clair
	Scott		Wright	Saline
	Stoddard			Vernon

2018

About the Missouri Economic Research and Information Center

The Missouri Economic Research and Information Center (MERIC) provides comprehensive analysis of Missouri's socioeconomic environment at the local, regional and state levels. To achieve this, MERIC employs a wide array of tools, which include econometric models, geographic information systems and advanced statistical methods. On-going projects at MERIC include targeted development, economic and social impact assessments, industry and occupational analyses, career seeker products and information on Missouri's demographic and economic trends.

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